Huron produces regular Findings Updates summarizing relevant trends and headlines related to the COVID-19 pandemic and its impact on higher education.

## Latest Trends and Headlines

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<th>Today’s Headlines</th>
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<td><strong>Re-Opening Operations</strong></td>
<td>Universities continue to announce – and revise – expectations for fall instruction, residence life, and athletics operations.</td>
<td>▪ Some MBA programs have recently switched to online delivery in the fall after originally planning for in-person and hybrid courses.</td>
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<td>▪ <a href="https://www.westvirginia.gov/">West Virginia’s governor</a> announced a $2.5 million support pledge to help the state’s smaller institutions conduct COVID-19 testing this fall.</td>
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<td>▪ Less than a month from the start of the fall semester, <a href="https://www.msu.edu/">Michigan State University’s president</a> wrote to students urging those who can study remotely to stay home.</td>
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<td>▪ The North Carolina Orange County Health Director has urged the <a href="https://chancellor.unc.edu/">University of North Carolina’s Chancellor</a> to delay the start of in-person classes by five weeks.</td>
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<td>▪ <a href="https://www.baylor.edu/">Baylor University</a> shares details on precautionary COVID-19 measures for upcoming year, including mailed-home tests and newly installed air filtration systems.</td>
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<td><strong>Student Impact, Admissions &amp; Enrollment</strong></td>
<td>The pandemic has created unprecedented challenges for students, and in turn enrollment risks for many institutions.</td>
<td>▪ <a href="https://www.virginia.edu/">The University of Virginia</a> will delay undergraduate in-person instruction and residence hall move-in dates by two weeks.</td>
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<td>▪ Seven institutions have formed the <a href="https://www.bigten.org/">Big Ten Alliance</a>, offering undergraduate students the opportunity to take online courses across participating institutions at no additional cost.</td>
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<td><strong>Financial Impact &amp; Response Actions</strong></td>
<td>Universities continue to use spending freezes, layoffs, and other means to address funding gaps created by the pandemic.</td>
<td>▪ Both <a href="https://www.auburn.edu/">Auburn University</a> and <a href="https://www.unc.edu/">the University of North Carolina</a> will lose multi-million dollar payouts following the cancellation of the Chick-Fil-A Kickoff.</td>
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<td>▪ The <a href="https://www.pac12.com/">Pac-12 Conference</a> is planning to offer a massive loan option to college athletics programs in the event that football is canceled this fall.</td>
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<td>▪ <a href="https://www.highered.org/">Public colleges and universities</a> are facing a huge blow from dwindling appropriations as state deficits grow.</td>
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<td><strong>Research Re-Entry &amp; Contributions</strong></td>
<td>Universities continue to ramp-up research activities, including activities directly related to researching COVID-19.</td>
<td>▪ <a href="https://www.princeton.edu/">Princeton University</a> has moved towards permitting more onsite research provided that study teams have their research plan approved by the Office of the Dean for Research.</td>
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<td>▪ UPDATE: <a href="https://www.northwestern.edu/">Northwestern University</a> allows non-laboratory research graduate students to return to campus and expands the types of human research allowed on campus during Step 4 of its phased return to campus plan.</td>
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<td>▪ UPDATE: <a href="https://www.washington.edu/">University of Washington</a> is in Phase 2 of its recovery plan and permits the resumption of a variety of human research activities.</td>
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<td><strong>Potential</strong></td>
<td>The pandemic’s economic and social impact could accelerate</td>
<td>▪ While the coronavirus pandemic may be a transformative moment for higher education, the <a href="https://www.huron.com">trends driving the disruption are not unexpected</a>.</td>
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### Transformation to Higher Ed
transformational change in higher education.

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<th>Universities continue to address emerging trends while operating through the pandemic.</th>
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<td>▪ The University of Connecticut announced it will cancel its upcoming football season due to concerns stemming from the coronavirus, becoming the first university playing in the Football Bowl Subdivision (FBS) to do so.</td>
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<td>▪ The NCAA Division III Presidents Council has canceled the division's fall championships for all sports.</td>
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### Today’s Headlines Summaries

#### A. Re-Opening Operations

- **Covid Surge Threatens M.B.A. Programs’ Already Limited Back-to-School Plans**
  - Many MBA programs justify their high cost by showing the value of in-person courses, on-campus events, and the network-building with classmates and faculty.
  - As many institutions are scrapping their plans for a residential fall, some MBA programs are scrambling to keep a small amount of on-campus experiences, while other MBA programs have recently announced an online fall semester.
  - Wharton (Penn) and McDonough (Georgetown) are the two latest business schools to announce an all-virtual model, at least for now.

- **Smaller Colleges, Universities Receive Help for Coronavirus Testing**
  - West Virginia’s smaller colleges and universities are receiving financial assistance to conduct coronavirus tests at the start of the fall semester.
  - Governor Jim Justice announced the $2.5 million pledge at a coronavirus briefing, saying the institutions need help to keep campuses safe for in-person activities.
  - The governor said all institutions need to be testing everyone who will be on campus during the fall semester.

- **Michigan State Tells Students: Stay Home For the Fall if You Can**
  - Less than a month before classes are set to begin at Michigan State University, President Samuel Stanley is encouraging students to stay at home for fall semester if they can as COVID-19 cases continue to spread.
  - "If you can live safely and study successfully at home, we encourage you to consider that option for the fall semester," Stanley wrote in an email sent to students Monday.
  - MSU undergraduate classes resume Sept. 2, though some graduate students, such as those in the law school, begin as soon as Aug. 17.

- **Orange County Health Director Wants UNC to Delay In-Person Classes for at Least 5 Weeks**
  - Orange County’s health director is asking the university to — at minimum — use fully online instruction for the first five weeks of the fall semester.
  - Health Director Quintana Stewart, in a letter to UNC Chancellor Kevin Guskiewicz, said she would prefer that UNC consider virtual classes for the entire fall semester.
  - Orange County could issue a stay-at-home order, which would force UNC to halt campus operations and move all classes online this fall, although such an order would also impact local business.
  - The UNC System said that chancellors have been told to comply with any order or recommendation to delay or shut down in-person learning that comes from the institution’s county health department.

- **Baylor University shares details on precautionary COVID-19 measures for upcoming year.**
  - Highlights of the university’s plan include mailing COVID-19 tests to all students, faculty, and staff and installing new UV-C air filtration technology in shared spaces.
The university has also installed over 500 hand sanitizer dispensers across campus and will implement precautionary measures such as instituting new entry/exit policies, reducing room occupancy and creating spatial separation, and mandating face coverings.

- Baylor has modified its class schedules around building usage and traffic, and installed plexiglass barriers in offices without six-foot social distancing measures.

### B. Student Impact, Admissions & Enrollment

- **The University of Virginia will delay undergraduate in-person instruction and residence hall move-in dates by two weeks.**
  - The University of Virginia announced changes to their original return to campus plans announced June 17th, due to the increase in COVID-19 cases locally and nationwide and the lack of testing materials.
  - The University stated a “complete move-in schedule will be released at a later date” and that any students living in off-campus housing should delay their return to campus until the start of in-person courses.
  - Students with “extenuating circumstances” will be allowed to return to campus and the University will work with those students, and international students planning to take in-person courses should arrive in the United States by August 25, to meet quarantine and immigration requirements.
  - Classroom capacities have been adjusted to meet physical distancing, plexiglass shields have been added for faculty members, and the campus will be sanitized following cleaning protocols.

- **Big Ten Academic Alliance to offer online courses for free for undergraduate students**
  - Beginning this fall, undergraduate students at any participating Big Ten Academic Alliance university can take an online course from another participating Big Ten school each semester, with all tuition and fees waived for that course.
  - So far, seven institutions have decided to participate in the new Academic Alliance.

### C. Financial Impact and Response Actions

- **Auburn, UNC to Lose Multi-Million Dollar Payouts After Cancellation of Chick-Fil-A Kickoff**
  - The ACC announced that the conference would adopt a schedule that included ten in-conference games with one additional non-conference matchup, and UNC elected to hold their scheduled non-conference game with Auburn.
  - Last week, the SEC announced a ten-game conference-only schedule, canceling the previously scheduled UNC versus Auburn non-conference game.
  - For that game, Auburn was guaranteed a payout of $5 million for selling its ticket allotment and UNC was guaranteed a payout of $3 million.

- **Pac-12 Rescue Operation: Coronavirus Loan Program Would Bail Out Athletic Departments if Football is Canceled**
  - Mercury News Reports the Pac-12 is planning a major loan program that would provide an escape hatch for cash-strapped athletic departments in the event the football season is canceled.
  - According to a series of emails obtained through public records requests, the loan would provide a maximum of $83 million for each university at a rate of 3.75% over 10 years.
  - Each athletic department could decide whether it wanted to participate in the program and if all 12 opted for the maximum amount, the total would be $996 million.

- **Public Colleges and Universities Face Gut Punch From States’ COVID-19 Deficits**
  - Colleges and Universities will face unprecedented shortfalls in revenue this fall, from lower enrollment to loss of revenue from dining and housing.
  - On top of this, states are being forced to slash subsidies for higher education as record budget deficits
mount and the prospect for massive federal help dims.
  o California lawmakers in June slashed spending on higher education by $1.7 billion, causing a 12% cut to the University of California’s budget for fiscal 2021.
  o Ohio reduced funding for the state’s public colleges and universities by $110 million in May.

D. Research Re-Entry and Contributions

- **Princeton University: Plan for the Phased Resumption of On-Campus Research**
  o Princeton University transitioned from Level 3 (essential research) to [Level 2 (Phased Resumption of Research)] on June 17th.
  o Level 2 guidance stipulates that the Office of the Dean for Research must approve research plans detailing resource allocation, cleaning procedures, and plans to enforce social distancing.
  o The school has categorized [human subject research (HSR)] into three classifications:
    - Category 1: Distance research
    - Category 2: In person research that does not necessitate close interaction with research subjects or equipment
    - Category 3: In-person research that necessitates close interaction of research subjects with the research team or equipment
  o Category 1 HSR permissible, while approvals from the Department Chair and the Office of the Dean for Research are required prior to conducting research falling into categories 2 and/or 3.

- **UPDATE: Northwestern University: COVID-19 and Campus Updates**
  o Northwestern University is in Step 4 – Summer Stabilization of its phased return to campus.
  o **Step 4 permits:**
    - The return of non-laboratory research graduate students
    - Raised occupancy limits in research workspaces from 50 percent to 65 percent
  o The institution permits human research activities to resume operations if the research cannot be carried out virtually and the PI creates a safety plan (or utilizes the Pandemic Research Plan).

- **UPDATE: University of Washington: Mitigating Impacts to Research Activities Due to COVID-19**
  o University of Washington is in Phase 2 of its COVID-19 recovery plan.
  o Non-critical personnel may return to campus if their work can be done safely and is “absolutely necessary” to maintain unit operations.
  o UW is resuming the following human subjects research/research activities:
    - COVID-focused research
    - Research procedures performed during clinical care visits
    - Longitudinal research for participants with a visit prior to the ramp-down order in March
    - In-person safety monitoring procedures for participants that were enrolled in a study prior to the March ramp down
E. Potential Transformation to Higher Education

- **Five Ways COVID-19 Will Change Higher Education for Forever, and How Colleges Can Adapt**
  - Higher education has been slowly going through a disruptive phase for at least the last decade, and with COVID-19, this change will be accelerated at “breathtaking speed”.
  - An article in USA Today describes the five megatrends that will reshape the higher education landscape and how colleges can adapt:
    - **Demonstrated Value**: As students and parents are paying more attention to the intersection of value and price, institutions will have to be more reflective about the quality offered and the perceived value.
    - **Education on Demand**: Today’s students want education when they want it and delivered the way they want it. Institutions will have to continue to “bend the model” and offer more tailored or non-traditional higher education options.
    - **A Focus on Life Launch**: Consumers of higher education go to (or pay for) college because they want to do well in life. Colleges will need to show how successful they have been in launching graduates into lives and careers and supporting those who may need more time to launch.
    - **Location Matters**: More and more students are considering their own personal and experiential needs (health, entertainment, transportation) when choosing where to study and live.
    - **Brand Appeal**: Students crave brands that add meaning to their life or speak to the journey they hope to take. Institutions will have to prioritize their brand and realize its difference from marketing.

F. Other Headlines and Emerging Trends

- **UConn Becomes First Major Program to Cancel Football Season**
  - Most of the major conferences (“Power Five”) have announced a Conference-only football schedule, which impacts non-Power Five schools who will no longer be able to play these games.
  - UConn has already had three games against Power Five schools canceled and two more games in question.
  - In a statement, UConn athletic director David Benedict attributed the decision to guidance from state health officials and consultation with student athletes, and UConn players released a joint statement in support of the decision.
  - Prior to coronavirus, UConn had planned to play as an independent – outside of a conference – for the upcoming season after playing in the American Athletic Conference last season.
  - Several games had already been cancelled by opponents because of scheduling decisions made by conferences to only play opponents within their respective leagues.
  - According to public data filed with the NCAA, UConn has been one of the most cash-strapped athletics departments in the FBS.

- **NCAA Division III Presidents Council Cancels Fall Championships**
  - The NCAA announced it would cancel championships in fall sports for 2020-21.
  - “Our Championships Committee reviewed the financial and logistical ramifications if Division III fall sports championships were conducted in the spring and found it was logistically untenable and financially prohibitive,” said Tori Murden McClure, chair of the Presidents Council.
Recent Huron Articles

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<td>Infographic: Classroom Optimization</td>
<td>Lee Smith</td>
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<td>Colin McWilliams</td>
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<td>Jay Rowan</td>
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