This presentation provides a directional, representative overview of the higher education industry’s response to Covid-19. **Analysis includes data from 158 institutions** (see breakdown in Appendix) and captures discrete actions taken in response to Covid-19 between January 1 and April 21, 2020.

20+ Huron consultants collected data by tracking institutions’ public-facing websites daily. Huron tracked over 175 types of actions (see detail in Appendix) that were iterated over several weeks. **The actions are extensive but not exhaustive of all institutional actions.**

Whenever possible, the dates of the actions were logged to allow for longitudinal analysis, though in some cases dates were unclear or unavailable.

Huron supplemented this analysis with additional perspectives, anecdotes, and insights based on our industry experience, including work with many of these institutions.

**Agenda**

1. **Executive Summary**
   Summarizes key takeaways and considerations from initial analysis

2. **Institutional Actions**
   Assesses actions impacting the broader campus and its operations

3. **Student-Related Actions**
   Assesses actions impacting student life and academics

4. **Employee-Related Actions**
   Assesses actions impacting the institution’s workforce

5. **Financial Controls**
   Assesses actions taken in response to financial pressures

6. **Appendix**
   Summarizes institutions and actions included in dataset
EXECUTIVE SUMMARY

Section 1

OVERVIEW
High-level summary of the effort and Huron’s data gathering process

TIMELINE OF RESPONSES
Master timeline of all actions tracked between January and April 2020

ACADEMIC TERMS
Summary of actions impacting specific academic terms

FINANCIAL IMPACTS
Overview of financial impacts documented to-date industry-wide

LOOKING AHEAD
Huron’s perspective on actions to come across US higher education
Executive Summary
Overview

On January 30, the World Health Organization declared Covid-19 a global health emergency. The pandemic’s spread has radically challenged higher education in unprecedented ways.

As early as January 15th, U.S. institutions began responding to the COVID-19 pandemic by:

- Establishing dedicated websites to update their communities on the pandemic
- Announcing actions through internal emails, public memos, social media, and multimedia channels

Huron began tracking actions publicly announced by a set of 150+ U.S. institutions¹

- Identified over 175 types of actions, ranging from “Mandating Remote Instruction” to “Changing Paid Leave Policies” to “Restricting International Travel”
- Huron has logged over 6,000 total actions announced by the institutions since January 1, 2021

The analysis of institutional actions that follows highlights broad trends to-date, specific examples and anecdotes, and Huron’s perspective on trends to anticipate moving forward.

1. See Appendix slide 46 for additional detail on the types of actions tracked
Executive Summary
Timeline of Responses

Huron has been tracking the announcements and actions of over 150 institutions across the country and has organized the announcements in four general waves.

WAVE 1: Limit Exposure
Restricting travel, events, visitors, etc.

WAVE 2: Close for Spring Term / Health & Safety
Transition to remote instruction, telecommuting, etc.

WAVE 3: Restrict Summer & Fall
Cancel programs, study abroad, etc.

WAVE 4: Reduce Costs
Freeze hiring, salaries, etc.

The four waves overlap and are staggered largely due to differences in the geographic impact of COVID-19. The next waves will likely focus on FY21 and re-opening campus.
Executive Summary

Academic Terms

Institutions had to respond urgently to the COVID-19 pandemic in the middle of the Spring term, and many are now turning to planning for the Fall.

Sample Actions by Term

Spring Term
- Mandate Remote Instruction (96%)
- Change Grading Policies (73%)
- Cancel Study Abroad (70%)
- Refund Housing Fees (68%)

Summer Term
- Mandate Remote Instruction (64%)
- Cancel Study Abroad (21%)
- Cancel K-12 Programming (9%)
- Reduce Tuition (5%)

Fall Term
- Mandate Remote Orientation (9%)
- Delay Registration (7%)
- Change Admissions Policies (7%)
- Cancel Study Abroad (3%)

Institutions had to respond urgently to the COVID-19 pandemic in the middle of the Spring term, and many are now turning to planning for the Fall.
Executive Summary
Financial Impacts

Given the financial and economic impacts of the COVID-19 pandemic, many institutions have begun taking aggressive action to control costs.

Immediate Financial Impacts from COVID-19

- **Refunds for Students**
  Refunds for housing and dining (>80% of institutions)

- **Additional Financial Aid**
  Some institutions offered funds for students to travel home

- **Cancelled Travel**
  Many institutions refunded expenses for cancelled travel for students and employees

- **Support for Remote Work**
  Several institutions had to update their IT infrastructure to accommodate remote work

Over 70 institutions have announced either freezes or strong restrictions on hiring faculty and staff for the immediate future

**Sample List of Institutions:**
Colgate University, WPI, University of Houston, Kansas State University, Villanova University, Miami University, Bucknell University, University of Nevada-Las Vegas, Cornell University

Over 35 institutions have publicly announced freezes on salary increases for faculty and staff for fiscal year 2021

**Sample List of Institutions:**
Baylor University, Indiana University, Washington State University, Stanford University, Dartmouth College, University of Southern California, University of Colorado Boulder

Over 30 institutions have restricted spending to only necessary purchases, especially while staff are telecommuting

**Sample List of Institutions:**
Duke University, University of Miami, MIT, Wichita State University, Georgetown University, Marquette University, Brandeis University, University of Chicago

Many institutions are mimicking financial actions they undertook in response to the Great Recession, though discretionary spending has already been reduced from their Covid-19 response.
Executive Summary
Looking Ahead

Institutions will spend the summer modeling scenarios for reopening campus and resuming operations. The following considerations will drive their contingency plans and timelines.

**FINANCES**
What will our response cost? What might we recoup? What is the longer-term impact on revenues?

**OPERATIONS**
What critical functions must continue? What functions could we stop doing? What projects should we still prioritize?

**PHYSICAL ENVIRONMENT**
What will we be able to open? How will distancing affect space planning? What health and safety measures are needed?

**WORKFORCE & COMMUNITY**
How can we engage a remote workforce? How will necessary cost reductions affect us? How should we continue to serve our communities?

**COMPLIANCE**
How will shifting regulations impact us? What supplementary policies do we need in place? What is our capability for monitoring?

**STUDENT NEEDS**
How do we engage students and alumni? Will we be able to maintain enrollment? Which programs have high demand and needs?

Most institutions will test scenarios for resuming normal operations (i.e., in-person instruction, open facilities, research activity, etc.) or some hybrid in Fall 2020, Spring 2021, or Fall 2021.
INSTITUTIONAL ACTIONS

SUMMARY OF FINDINGS
Huron’s significant takeaways from institutional responses to the pandemic

TRAVEL RESTRICTIONS
Analysis of actions affecting personal and institution-sponsored travel

EVENT RESTRICTIONS
Analysis of actions limiting on-campus events or updating events policies

FACILITY RESTRICTIONS
Analysis of actions updating facilities access or operating hours

ADDITIONAL GUIDANCE
Analysis of general guidance and informational communications

LOOKING AHEAD
Huron’s perspective on institutional actions to come
Institutional Actions
Summary of Findings

Most institutions instituted a range of campus-wide actions that affected all constituents and altered institutional operations across the board.

<table>
<thead>
<tr>
<th>COMMUNICATING W/ THE COMMUNITY</th>
<th>RESTRICTING TRAVEL</th>
<th>LIMITING ACCESS TO FACILITIES</th>
<th>LIMITING CAMPUS ACTIVITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequent deployment of robust approaches, including dedicated websites, public status trackers, &amp; announcement archives</td>
<td>Widespread mandates for traveler check-ins with health services (to establish chain of care)</td>
<td>Waves of limitations often including housing/dining, recreational, and then research facilities</td>
<td>Initial requests for units to cancel events or make them remote</td>
</tr>
<tr>
<td>Occasional use of online channels to great success (live town halls, social media, presidential videos)</td>
<td>Near-universal limits on institution-sponsored international travel before domestic</td>
<td>Release of daily/weekly lists with updated facility hours and operations</td>
<td>Mandated cancelation of in-person events on most campuses by March</td>
</tr>
<tr>
<td>Nearly all using public-facing Covid-19 websites</td>
<td>Initial restrictions on individual countries or blanket limits based on CDC guidance</td>
<td>Development of ad hoc processes to request/grant access for essential employees</td>
<td>Specific restrictions to the general public, but challenges with enforcement</td>
</tr>
</tbody>
</table>

In the early weeks of Covid-19 response, institutions took more general preparatory and...
Institutional Actions
Travel Restrictions

Nearly 90% of institutions have restricted or cancelled international travel, but only 60% of institutions have announced similar restrictions for domestic travel.

The earliest institutional actions related to the COVID-19 pandemic were to restrict international travel. Domestic travel restrictions were largely announced when campuses closed for the Spring term.

International Trends by Month
- January – China, S Korea
- February – Italy, Spain
- March – All countries

Domestic Trends
In early March, most institutions cancelled all student and employee travel anywhere in the United States.

Any numbers and statements in this presentation reference the 150+ institutions Huron tracked, not all US institutions. Analysis reflects data collected from public announcements in March and April 2020.
Institutional Actions

Travel Guidance

Several institutions also provided guidance to their employees, especially those who were travelling during the early days of the COVID-19 pandemic, to protect the campus community.

Institutions which had invested in travel management programs often met the “duty of care” obligation regarding institution-related travel and were able to quickly locate their travelers.

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Institutional Actions

Event Restrictions

Institutional campuses are flurries of activity throughout the Spring term, with student events, academic conferences, and administrative gatherings. Most were cancelled in early March.

Early Event Guidance
Focused on large groups and on-campus events…
But from 3/9 to 3/11 Many institutions cancelled all events

Open Campuses are Difficult to Close
While some institutions attempted to restrict access to visitors, most focused on their own communities first

Though some institutions did not publicly announce event cancellations and visitor restrictions, the vast majority enforced such actions after closing their campuses to students and employees.
Institutional Actions

Facility Restrictions

Institutions reacted quickly to restrict access to their facilities in late February and early March. Only a few have started leveraging their facilities to support the healthcare systems.

<table>
<thead>
<tr>
<th></th>
<th>DISCOURAGED USE OF FACILITIES</th>
<th>LIMITED ACCESS TO FACILITIES</th>
<th>CLOSED FACILITIES OUTRIGHT</th>
<th>OFFERED ACCESS TO FACILITIES</th>
<th>OPENED FACILITIES ON A LIMITED BASIS</th>
<th>RE-OPENED FACILITIES TO THE COMMUNITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>31%</td>
<td>64%</td>
<td>89%</td>
<td>5%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Some institutions discouraged students from returning to their residence halls, but did not close them because some students could not return home.

Many institutions focused on dining halls and student spaces on campus.

Research facilities were often limited to only essential personnel.

Some institutions closed all facilities with no exceptions.

Many institutions focused on auxiliary facilities (e.g., libraries, bookstores).

Some institutions have opened their residence halls, parking, and/or dining facilities to local healthcare systems or their affiliated academic medical centers.

We anticipate that institutions will likely open some facilities slowly or on a limited basis over the coming months, focusing on research and admin facilities.

Depending on government guidance and the availability of a COVID-19 vaccine, some campuses may not fully re-open until the Fall term or later.

Institutional administrations are taking guidance from state and local governments regarding when to re-open their facilities and campuses. At this point, no institutions* have publicly re-opened.

*Numbers and statements in this presentation reference the 150+ institutions Huron tracked, not all US institutions. The percentages shown are the proportion of institutions which announced the identified action for any institutional facility.
Institutional Actions
Residential & Dining Facilities

Institutions acted quickly to close residential halls and dining facilities in early March, though many offered exceptions or limited hours for students who could not return home.

Different Approaches

Some institutions…
…announced closures early-on with no exceptions or options for students who could not return home (e.g., international students)

These announcements were often met with outrage from students and negative media attention

Other institutions…
…avoided such negative backlash by including appropriate provisions for students who could not leave campus

Most institutions have retained limited hours for dining facilities, but the vast majority have closed their residential halls to all but a select number of students.
Many institutions announced individual restrictions and closure of certain facilities in early March as they grappled with the impact of the COVID-19 pandemic.

A select few institutions created facility websites which showed the status of all on-campus facilities in real-time. These status trackers helped stakeholders identify closures in one location.

Restricted access to or closed all on-campus facilities outright in early March

Most institutions announced piecemeal closures of facilities over the course of a few weeks in a series of public memos and email announcements

A select few institutions created facility websites which showed the status of all on-campus facilities in real-time. These status trackers helped stakeholders identify closures in one location.
Institutional Actions
Guidance for the Community

In addition to announcing decisions impacting their employees, students, and facilities, most institutions also sent guidance and information to their communities related to COVID-19.

Even if they did not have actions to announce, institutions significantly increased communication with their communities in March as the pandemic began spreading more widely.

General Guidance for the Community
from 150+ Institutions

- 68% Confirm Cases of COVID-19 in the Community
- 30% Offer a Message of Support for the Community
- 23% Offer Support for People of Asian Descent
- 20% Establish a COVID-19 Task Force
- 9% Declare a Public State of Emergency

Any numbers and statements in this presentation reference the 150+ institutions Huron tracked, not all US institutions. Analysis reflects data collected from public announcements in March and April 2020.
Institutional Actions
Looking Ahead

Based on actions to-date, Huron anticipates lingering restrictions on institutional travel and precautionary restrictions of campus facilities aligned with local and state guidance.

<table>
<thead>
<tr>
<th>CONTINUING RESTRICTIONS</th>
<th>CANCELING INT’L TRAVEL</th>
<th>ACCESSING DINING/RESIDENCE HALLS</th>
<th>LIMITING DOMESTIC TRAVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuation of existing event and travel restrictions for awhile</td>
<td>Restrictions on institution-sponsored travel continuing into Summer and Fall</td>
<td>Continued closures through Summer</td>
<td>Decisions highly dependent on monitoring of state-specific regulations</td>
</tr>
<tr>
<td>Facilities closures likely in effect until social distancing guidelines loosened</td>
<td>Potential relaxation of guidance regarding personal travel mid-Fall term</td>
<td>Additional options for returning student belongings</td>
<td>Potential easing of restrictions for essential personnel as early as late Summer/early Fall</td>
</tr>
<tr>
<td>Other remaining restrictions driven by internal cost controls</td>
<td>Continued mandatory quarantine for anyone traveling internationally</td>
<td>Additional use of facilities for healthcare workers or patients</td>
<td>Continued requests for traveler self-reporting to institutional health services</td>
</tr>
</tbody>
</table>

Institutions will likely continue scenario-based contingency planning in alignment with their…

...states. Additional restrictions and precautions are expected to continue through the Summer.
Huron's significant takeaways from institutional responses to the pandemic

Analysis of actions related to remote course delivery

Analysis of actions impacting the student experience for Spring 2020

Analysis of actions impacting the student experience for Summer 2020

Analysis of actions impacting the student experience for Fall 2020

Huron’s perspective on institutional actions to come
## Student-Related Actions

### Summary of Findings

The first waves of institutional actions included many changes to student programming and the student academic experience.

### Preparing for Remote Courses
- Extensions of Spring Breaks to allow faculty a transition period
- Several large technology investments to aid remote learning
- Provosts encouraging syllabus adaptation and flexibility
- Student access to internet and technology as a major barrier

### Relaxing Student Policies
- Initial waves of change to Spring grading policies and withdrawal deadlines
- Subsequent waves incl. transition of Summer courses online & waivers of Summer fees
- Frequent refunds of housing and dining fees and occasional relaxation of parking and recreation fee policies

### Canceling Study Abroad
- Initial cancelation of Spring programs in China/Italy
- Widespread cancelation of all Spring programs by mid-March
- Occasional student refunds for Spring study abroad fees
- More recent waves of Summer/Fall study abroad cancelations

### Paying Student Workers
- Frequent commitments to pay graduate student stipends in full
- Commitments to continue paying undergrads, often contingent on ability to work remote
- Pay limitations for some schools' Federal Work Study students based on funds limited

---

Initial actions focused on adapting instruction, student programming, and student policies for the...
Student-Related Actions
Remote Instruction

Most institutions transitioned their Spring courses to remote learning over the course of three days. 75% of institutions have mandated the same for Summer courses since late March.

Most institutions will likely have transitioned their Summer courses to remote instruction by May 1st if current trends continue. Thus far, few institutions have announced remote instruction for the Fall.
Student-Related Actions
Spring Term Student Support & Activities

Institutions were far less consistent in terms of the public announcement of changes to student services and activities, partially due to the quick transition to remote instruction.

Student Activity Changes from 150+ Institutions

- Athletic Events: 36%
- Athletic Activities: 26%
- Student Advising: 22%
- Clinical Experiences: 6%
- Student Services: 2%

Progression of Decision-Making

Early Decisions
Many institutions announced restrictions to student services in late February when other activities were cancelled.

Campus Closures
Once campuses transitioned to remote instruction, all student activities were cancelled or transitioned to remote.

Many institutions announced changes in or cancellation of student activities in consultation with third parties like athletic conferences and clinical partners.
Student-Related Actions

Refunds for the Spring Term

Institutions began refunding students for room and board once instruction transitioned to remote methods. Few institutions have offered refunds on tuition or fees.

Recent stories in the media indicate that institutions may be asked to grapple with refunds for tuition through lawsuits or other means. Most institutions have not offered public statements.
Student-Related Actions
Academic Policy Changes for the Spring

Because of the speed with which institutions pivoted to remote instruction, many also relaxed their academic policies for the Spring term to allow flexibility for students and faculty.

Many institutions that did not publicly announce policy or deadline changes still allowed exceptions on a case-by-case basis. Other institutions announced these changes internally only.

- **73%** Most institutions pivoted to allow or mandate pass/fail grading for all Spring courses.
- **20%** Pivoting mid-term to remote instruction pushed some institutions to relax their withdrawal deadlines.
- **6%** With students dispersing, some institutions relaxed attendance policies in the short-term.
- **4%** A few institutions delayed deadlines like major declarations and study abroad applications.
- **2%** Two institutions relaxed probation since some students would not be able to meet the requirements.
For commencement, most institutions have announced a remote event, delays, or an outright cancellation with plans to follow. However, very few have cancelled or delayed final exams.

Commencements will look different in one way or another. Many institutions have committed to hold in-person activities in the Fall or create remote celebrations in the Spring.

In alignment with remote instruction, most institutions adapting final exams did so by making them remote also. Few canceled them outright or changed the exam schedule.

Roughly 20% of institutions have stayed quiet on commencement or have announced that they are waiting to see what the situation will be in May/June.
Student-Related Actions
Summer Term

Aside from moving courses to remote instruction, many institutions have started restricting other Summer term activities, like study abroad and K-12 programming.

Given the generally high profitability of summer programs for institutions – especially K-12 programming – these restrictions can result in a significant revenue reduction.
Student-Related Actions

Fall Term

For the Fall term, institutions have focused on targeted actions to address the COVID-19 pandemic and maintain enrollment numbers.

The number of institutions relaxing admissions practices and delaying enrollment deadlines has been increasing steadily in April to ensure Fall enrollment hits its targets.

40% of universities have announced decisions about the Fall term – largely focusing relaxing admissions policies and enrollment processes.

Very few institutions have publicly announced how instruction will be delivered in the Fall.
Student-Related Actions

Looking Ahead

As student needs and expectations shift, institutions will be forced to continue adapting practices to provide remote student support and engage prospective students.

<table>
<thead>
<tr>
<th>REQUESTING TUITION REFUNDS</th>
<th>ENGAGING VIRTUALLY</th>
<th>SUSTAINING FALL ENROLLMENT</th>
<th>LIMITING FALL ACTIVITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uptick in requests for Spring tuition refunds</td>
<td>Growth in number of virtual commencements</td>
<td>Increased recruitment of local students</td>
<td>More widespread study abroad cancellations</td>
</tr>
<tr>
<td>Additional requests for tuition discounts or refunds for Summer/Fall</td>
<td>Increased reliance on virtual recruitment activities (e.g. campus visits, interviews)</td>
<td>Additional relaxations of admissions requirements (e.g. test-optional)</td>
<td>Limitations to student activities (e.g., athletics, organizations, other programming)</td>
</tr>
<tr>
<td>Increase in student lawsuits related to refunds</td>
<td>Expansion of online student advising, co-curricular activities, and mental health services</td>
<td>Emphasis on holistic admissions</td>
<td>Continued – although perhaps loosened – restrictions on athletic activities</td>
</tr>
</tbody>
</table>

As concerns about Fall 2020 enrollment grow, campus leaders and enrollment managers will...

...take further actions to preserve their applicant pools, ensure high yields, & serve current students.
Section 4

EMPLOYEE-RELATED ACTIONS

SUMMARY OF FINDINGS
Huron’s significant take-aways from institutional responses to the pandemic

REMOTE WORK
Analysis of actions related to employee telecommuting

EMPLOYEE SUPPORT
Analysis of actions related to employee policies and financial support

FACULTY CHANGES
Analysis of actions related to faculty tenure, sabbatical, and leave

LOOKING AHEAD
Huron’s perspective on institutional actions to come
## Employee-Related Actions

### Summary of Findings

Out of concern for their campus workforces, institutions began to introduce a series of changes to employee work expectations, human resources policies, and faculty/PI roles.

<table>
<thead>
<tr>
<th>RESPONDING QUICKLY</th>
<th>PROVIDING FLEXIBILITY</th>
<th>ADAPTING POLICIES</th>
<th>REASSURING EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transitions to remote work over the course of five days for most institutions</td>
<td>Suggested or required remote work at most institutions</td>
<td>Revisions to the definition of “essential employee”</td>
<td>Announcements emphasizing that faculty would not be impacted by slowdowns of activity</td>
</tr>
<tr>
<td>Quick initial wave of policy changes</td>
<td>Flexibility of hours and schedules encouraged by campus leaders</td>
<td>Frequent extensions of leave policies and relaxation of vacation accrual caps</td>
<td>Several announcements reassuring staff of continued employment through of the fiscal year</td>
</tr>
<tr>
<td>Early and ongoing communications at many institutions, even if minimal updates were available</td>
<td>Issuance of explicit guidance for managers &amp; supervisors</td>
<td>Early commitments to continue employee pay</td>
<td>Dedicated employee FAQs to keep personnel informed</td>
</tr>
<tr>
<td></td>
<td>Expanded childcare offerings for employees on some campuses</td>
<td>Small number of extensions of the faculty tenure clock</td>
<td></td>
</tr>
</tbody>
</table>

Most institutions communicated early & frequently with employees even if actions had not yet…

...been taken. Dedicated websites and FAQs signaled the priority of keeping employees informed.
Employee-Related Actions

Remote Work

With the COVID-19 pandemic spreading in early March, institutions began mandating remote work for employees in quick succession after mandating instruction be delivered remotely.

Most institutions firmed up their restrictions for employees during the week of March 9th – by cancelling or restricting institutional travel and mandating employees work remotely.

**Telecommuting Guidance from 150+ Institutions**

- **Mandate Telecommuting**
- **Suggest Telecommuting**

94% OF UNIVERSITIES

Transitioned to mandatory or suggested remote work for non-essential employees through telecommuting.

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Recognizing the stressors on their employees, many institutions made explicit commitments to continue paying employees or adjusted policies to provide support and reassurance.

Initial employee support actions were often timebound (e.g., end of the fiscal year). Institutions will likely revise these commitments as the financial impacts of the pandemic become clearer.
Employee-Related Actions
Faculty Changes

A handful of institutions have explicitly addressed faculty workloads, adjusted tenure and sabbatical policies, and provided general faculty guidance.

CONSIDERATIONS FOR THE FACULTY:

**TENURE CLOCK**
Given the abrupt changes in research and instruction, some institutions “stopped the clock” to offer flexibility to tenure-track faculty.

**SABBATICAL**
As more institutions grapple with changes to the Fall term, they may allow faculty to begin sabbatical early or change the sabbatical “clock.”

**FINANCIAL EXIGENCY**
Though none of the institutions tracked have declared a state of exigency yet, several smaller institutions have shuttered due to the pandemic.

As institutions grapple with the long-term impacts of Covid-19, they may be forced to consider cuts, restrictions, or changes to the faculty workforce that would previously have been “off the table.”
Employee-Related Actions

Looking Ahead

Institutional personnel will continue to experience noticeable changes to their routines and environments through the Summer and Fall – and likely beyond.

<table>
<thead>
<tr>
<th>PLANNING FOR REENTRY</th>
<th>ADJUSTING HIRING PLANS</th>
<th>REEVALUATING CERTAIN POLICIES</th>
<th>ALLOWING WORK-FROM-HOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliance on state &amp; local government guidance for when employees can return to work</td>
<td>Slowdown of student hiring given limited number of students on campus for Summer</td>
<td>Reevaluation of personnel policies, particularly around essential and non-essential classifications</td>
<td>Long-term changes to institutional work-from-home practices</td>
</tr>
<tr>
<td>Staggered phases of certain employee types returning to campus</td>
<td>Reevaluation of hiring needs based on adjusted campus activity and financial resources</td>
<td>Revisions or delays to visa processing timelines</td>
<td>Greater flexibility for individual units to determine appropriate work arrangements</td>
</tr>
<tr>
<td>Slower staggered returns to on-campus work based on geography and region</td>
<td>Revisions to position descriptions, particularly for executive leaders</td>
<td>Adaptations and revisions to exception approval processes</td>
<td></td>
</tr>
</tbody>
</table>

Near-term changes were designed to help institutions absorb the immediate effects of Covid-19. Some institutions may capitalize on the disruption to make longer-term policy and practice changes.
FINANCIAL CONTROL ACTIONS

**SUMMARY OF FINDINGS**
Huron’s significant takeaways from institutional responses to the pandemic

**COST CUTTING**
Analysis of actions related to employee discretionary / travel spending and capital spend

**PERSONNEL EXPENSES**
Analysis of actions related to salary, benefits, and other personnel expenses

**OPERATING EXPENSES**
Analysis of actions impacting departmental spending or institutional operating budgets

**CAPITAL EXPENSES**
Analysis of actions impacting capital projects

**LOOKING AHEAD**
Huron’s perspective on institutional actions to come
Financial Control Actions
Summary of Findings

Recognizing that COVID-19’s impact would last far beyond the Spring term, institutions announced cost-cutting measures designed to soften the near- & long-term financial impacts.

<table>
<thead>
<tr>
<th>REACTING TO THE PANDEMIC</th>
<th>TARGETING PERSONNEL COSTS</th>
<th>MINIMIZING NON-ESSENTIAL COSTS</th>
<th>SLOWING CAPITAL PROJECTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>First waves targeting highest spend categories and most readily accessible financial levers</td>
<td>Various workforce restrictions beginning in mid-late March</td>
<td>Limitations to employee and departmental discretionary spending in recent weeks</td>
<td>Complications due to contracts and donor funding</td>
</tr>
<tr>
<td>Initial actions related to personnel and operating expense restrictions</td>
<td>Frequent hiring and salary freezes</td>
<td>Pausing of planned or in-progress capital projects</td>
<td>More nuanced approaches rather than blanket freezes</td>
</tr>
<tr>
<td>Subsequent actions related to capital projects and budget reevaluations</td>
<td>Some restrictions to overtime pay and employee spending</td>
<td>Occasional restrictions to the institutional purchasing process</td>
<td>Pausing of unfunded projects or those not started</td>
</tr>
<tr>
<td></td>
<td>Occasional pausing of all recruiting activities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The first waves of financial controls included adjustments to internal operations and... 

...actions designed to curb personnel costs. Huron expects these measures to continue.
Financial Control Actions
Cost Cutting Activities

Most institutions announced limitations to personnel expenses, followed by a more recent increase in operating and capital expense restrictions.

Cost Cutting Actions
Total Across 150+ Institutions

- Limit Personnel Expenses
- Limit Operating Expenses
- Limit Capital Expenses

Reactive cost cuts may help institutions absorb the initial impacts of Covid-19, but we will likely see an uptick in long-range reductions and FY21 budget reevaluations.

Other Cost Cutting Actions:
- 28% Establish a Donor Fund for COVID-19
- 9% Review the FY21 Operating Budget
- 8% Estimate the Financial Impact of the Pandemic

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Financial Control Actions
Personnel Expenses

Hiring restrictions were by far the earliest and most common personnel actions announced. More recent waves have included various restrictions of existing employee salaries.

Salaries and benefits are the largest operating expense categories for institutions. Many will likely announce additional personnel cuts as the financial impact of the pandemic becomes clearer.

Any numbers and statements in this presentation reference the 150+ institutions Huron tracked, not all US institutions. Analysis reflects data collected from public announcements in March and April 2020.
Financial Control Actions
Operating Expenses

Nearly a quarter of all institutions in the dataset restricted or froze discretionary spending, which most frequently included employee travel spend, supply purchases, and athletics.

TOP COST CUTTING TARGETS:

REDUCING TRAVEL SPEND
Institutions were naturally able to reduce travel due to COVID-related restrictions, but many also limited travel for the next year to cut costs.

FREEZING SUPPLIES & SERVICES
Many institutions are restricting spending by lowering purchase authority levels, restricting p-card spending, and increasing scrutiny.

CUTTING SPORTS TEAMS
A few institutions have started announcing the elimination of certain sports teams – many of which were under review before the pandemic.

Mandated reductions to discretionary expenses will likely increase as institutions revisit FY21 budgets. Sweeping cuts (e.g. sports teams) will likely increase over the course of the summer.
Financial Control Actions
Capital Expenses

20% of institutions restricted or froze capital projects entirely, although funding sources and project timelines complicate their ability to immediately freeze all spending.

Actions on Capital Projects from 150+ Institutions

**Freeze Capital Projects:** 13%

**Restrict Capital Projects:** 7%

**CAPITAL PROJECT CONSIDERATIONS:**

**EXCEPTIONS TO THE RESTRICTIONS**

Many institutions announced exceptions for capital projects which are donor-funded, have begun construction, or have a strategic priority.

**SLOWING THE CONSTRUCTION PROCESS**

Most institutions halted capital projects due to statewide stay-at-home orders, which naturally slowed the construction timelines and expenses.

Institutions will likely reprioritize capital projects based on needs and reduced revenue projections. Most projects will likely remain be frozen until institutions have clearer pictures for the Fall term.
### Financial Control Actions

#### Looking Ahead

Preliminary financial projections and pending changes to Summer and Fall operations suggest that many institutions will be forced to take additional financial control actions.

<table>
<thead>
<tr>
<th>CONSIDERING FURLOUGHS</th>
<th>CUTTING OR FREEZING PAY</th>
<th>REEVALUATING BUDGETS</th>
<th>REVIEWING FUNDING MODELS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increases in the number of schools considering furloughs through the Summer</td>
<td>Additional schools cutting executive leader salaries</td>
<td>Revisions to initial FY21 budget plans through the Spring and Summer</td>
<td>Reevaluation of funding approach for certain schools or units</td>
</tr>
<tr>
<td>Possible evaluation of academic roles that were historically exempt from furloughs</td>
<td>Additional schools instituting salary freezes for FY21</td>
<td>Widespread mandates for campus units to trim budget requests</td>
<td>Measures to ensure equitable distribution of revenue</td>
</tr>
<tr>
<td>Mandatory unpaid-leave days as a furlough alternative</td>
<td>Limitations to graduate student and undergraduate worker pay beyond Spring term</td>
<td>De-prioritization of nonessential projects and discretionary spending for FY21</td>
<td>Greater central financial control in the near-term</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Near-term cost-saving measures will likely transition into longer-term financial mitigation...

...strategies as institutions get a better understanding of Covid-19’s lasting impacts.
APPENDIX

The analysis in this presentation included a sampling of major U.S. higher education institutions and covered a variety of actions.

The following appendices provide further detail on the institutions and actions included in the dataset.
Institutional Sample

Overview

Huron collected data on the Covid-19 responses of 158 US institutions. The institutions in the dataset were categorized as follows based on available IPEDS data.¹

<table>
<thead>
<tr>
<th>Category</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institutional Type</td>
<td>• Private</td>
</tr>
<tr>
<td></td>
<td>• Public</td>
</tr>
<tr>
<td>Carnegie Classification</td>
<td>• Doctoral Institutions</td>
</tr>
<tr>
<td></td>
<td>• Baccalaureate Colleges</td>
</tr>
<tr>
<td></td>
<td>• Master’s Colleges and Universities</td>
</tr>
<tr>
<td></td>
<td>• Other</td>
</tr>
<tr>
<td>Region</td>
<td>• City</td>
</tr>
<tr>
<td></td>
<td>• State</td>
</tr>
<tr>
<td></td>
<td>• Zip Code</td>
</tr>
<tr>
<td>Enrollment</td>
<td>• Total Undergraduate</td>
</tr>
<tr>
<td></td>
<td>• Total Graduate</td>
</tr>
</tbody>
</table>
Institutional Sample
Type and Carnegie Classification

Just over half of the institutions in the dataset are highest research (R1) doctoral institutions. The dataset is nearly evenly split between public and private non-profit institutions.

Total Institutions by Type (n=158)
- Public: 70 (44%)
- Private not-for-profit: 88 (56%)

Total Institutions by Carnegie Classification (n=158)
- Doctoral Universities: Highest Research Activity: 2 (1%)
- Doctoral Universities: Higher Research Activity: 8 (5%)
- Baccalaureate Colleges: Arts & Sciences Focus: 8 (5%)
- Doctoral Universities: Moderate Research Activity: 21 (14%)
- Master’s Colleges & Universities: Larger Programs: 32 (20%)
- Other: 87 (55%)
Institutional Sample

Region

The dataset includes institutions from all regions of the country, with a large concentration in the Midwest and Northeast.

Total Institutions by Location (n=158)
Institutional Sample

Enrollment

The majority of institutions in the dataset are heavily undergraduate-focused, though nearly all enroll a mix of undergraduate and graduate students.¹

1. Data represent total Undergraduate and Graduate students enrolled for credit (headcount, not FTE) in Fall 2018; source: Integrated Postsecondary Education Data System (IPEDS).
### Action Tracking

**Data Definitions**

Huron tracked over 175 discrete actions across several categories and on several scales. Actions were tracked as follows.

<table>
<thead>
<tr>
<th>Institutional Actions</th>
<th>Student-Related Actions</th>
<th>Employee-Related Actions</th>
<th>Financial Control Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actions impacting the broader campus and its operations, including:</td>
<td>Actions impacting student life and academics, including:</td>
<td>Actions impacting the institution’s workforce, including:</td>
<td>Actions taken in response to financial pressures, including:</td>
</tr>
<tr>
<td>• Residence and dining halls</td>
<td>• Class instruction</td>
<td>• Telecommuting</td>
<td>• Discretionary spending</td>
</tr>
<tr>
<td>• Research facilities</td>
<td>• Grading systems</td>
<td>• Employee travel</td>
<td>• Capital projects</td>
</tr>
<tr>
<td>• Campus events</td>
<td>• Commencement</td>
<td>• Employee payment</td>
<td>• Fee refunds</td>
</tr>
<tr>
<td>• Athletic activities</td>
<td>• Study Abroad</td>
<td>• Leave policies</td>
<td>• Recruiting and hiring</td>
</tr>
<tr>
<td>• Parking and transit</td>
<td>• Admissions policies</td>
<td>• Furloughs</td>
<td>• Budget reviews</td>
</tr>
<tr>
<td></td>
<td>• Fall orientation</td>
<td>• Tenure clock</td>
<td></td>
</tr>
</tbody>
</table>

#### Decisiveness:
Actions were categorized on several spectrums based on their decisiveness

- Suggesting → Mandating
- Delaying → Restricting → Canceling
- Discouraging → Limiting Use of → Closing
- Reducing → Refunding → Offering for Free

#### Timeframe:
Where appropriate, actions were also categorized by term (e.g., Spring Summer, Fall 2020)
QUESTIONS?
PLEASE FEEL FREE TO CONTACT US

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