

Virtual Town Hall Meeting

May 14, 2020

Presented by:

- Katherine Newman, Interim Chancellor
- Kathleen Kirleis, Vice Chancellor for Administration and Finance
- Marie Bowen Vice-Chancellor for Human Resources
- Katherine Lynch, Assistant Vice-Chancellor, Enrollment Management
- Garrett Smith, Deputy Chancellor
- Emily McDermott, Interim Provost and Vice Chancellor of Academic Affairs
- Marcelo Suárez-Orozco, Chancellor Elect

Agenda

- ▶ Introduction
- ▶ Financial Update
- ▶ Federal CARES Act
- ▶ Student Federal CARES Act Support
- ▶ Planning for Fall
- ▶ Academic/Research Summer and Fall Planning
- ▶ Greetings from Dr. Marcelo Suárez-Orozco

Financial Update

Boston: Revenue & Expenses Before COVID-19

(\$ in Thousands)

Revenues	BOSTON													
	Actual					Budget	Q1 Projection	Forecast					% Change FY21-25	
	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Cumulative	Avg. Annual
Gross Tuition & Fees	213,968	232,355	240,235	243,760	245,734	247,982	249,051	254,086	259,768	265,599	271,585	277,729	9.3%	2.2%
Tuition Discounts	(44,311)	(45,471)	(53,820)	(57,790)	(64,836)	(65,926)	(66,612)	(71,089)	(76,200)	(77,966)	(79,784)	(81,658)	14.9%	4.2%
Discount Rate	20.7%	19.6%	22.4%	23.7%	26.4%	26.6%	26.7%	28.0%	29.3%	29.4%	29.4%	29.4%	5.1%	2.0%
Net Tuition & Fees	169,657	186,884	186,415	185,970	180,898	182,056	182,438	182,997	183,567	187,634	191,801	196,071	7.1%	1.5%
Grants	48,561	53,927	58,201	56,212	53,536	56,211	56,211	56,211	56,211	56,211	56,211	56,211	0.0%	0.0%
Sales & Service, Educational	4,197	3,709	3,979	4,072	4,312	3,962	4,312	4,312	4,312	4,312	4,312	4,312	0.0%	1.6%
Auxiliary Enterprises	9,211	5,965	6,167	5,199	12,315	13,621	14,107	14,781	15,008	15,237	15,378	15,512	4.9%	2.5%
Other Operating	854	2,837	1,818	1,758	2,218	3,101	2,743	2,743	4,687	4,687	4,687	4,687	70.9%	5.7%
State appropriations	110,295	117,987	130,157	135,605	140,659	144,708	145,190	150,425	155,628	160,949	166,417	172,009	14.3%	3.4%
Other NonOperating	33,347	35,093	36,597	37,773	42,529	38,863	40,646	39,882	41,641	41,793	41,967	41,986	5.3%	1.5%
Total Revenues	376,122	406,402	423,334	426,589	436,467	442,523	445,647	451,352	461,054	470,823	480,771	490,787	8.7%	2.0%
% Growth	3.9%	8.1%	4.2%	0.8%	2.3%	1.4%	2.1%	2.0%	2.1%	2.1%	2.1%	2.1%		
Expenses	Actual					Budget	Q1 Projection	Forecast					% Change FY21-25	
	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Cumulative	Avg. Annual
	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Cumulative	Avg. Annual
Salaries & Fringe	244,755	266,100	275,330	269,465	269,723	268,359	272,711	273,615	279,620	283,720	291,285	299,991	9.6%	2.2%
Non-personnel	95,721	101,713	98,250	98,972	98,428	101,938	101,053	99,591	99,071	100,192	101,354	102,384	2.8%	0.1%
Scholarships and fellowships	12,254	16,047	16,161	17,180	17,983	17,180	17,983	17,983	17,983	17,983	17,983	17,983	0.0%	0.9%
Depreciation	16,572	18,988	22,246	24,433	28,010	33,578	33,238	35,029	38,081	40,696	42,231	42,705	21.9%	4.7%
Interest	8,133	9,064	12,476	14,152	16,823	21,468	20,662	20,620	19,379	18,815	18,303	17,908	-13.2%	-3.7%
Total Expenses	377,435	411,912	424,463	424,202	430,967	442,523	445,647	446,838	454,134	461,406	471,156	480,972	7.6%	1.7%
% Growth	8.6%	9.1%	3.0%	-0.1%	1.6%	2.7%	3.4%	1.0%	1.6%	1.6%	2.1%	2.1%		
Operating Margin	Actual					Budget	Q1 Projection	Forecast					% Change FY21-25	
	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Cumulative	Avg. Annual
	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Cumulative	Avg. Annual
UMass OM Calc Revenues	379,257	406,543	421,462	426,589	434,863	442,523	445,647	451,352	461,054	470,823	480,771	490,787	8.7%	2.0%
Total Expenses	377,435	411,912	424,463	424,202	430,967	442,523	445,647	446,838	454,134	461,406	471,156	480,972	7.6%	1.7%
Surplus / (Deficit)	1,822	(5,369)	(3,001)	2,387	3,896	0	1	4,514	6,919	9,416	9,615	9,816	117.5%	33.1%
UMass OM Calc	0.5%	-1.3%	-0.7%	0.6%	0.9%	0.0%	0.0%	1.0%	1.5%	2.0%	2.0%	2.0%		

Financial Implications of COVID-19

- ▶ Beginning mid-March the University began assessing the financial impact of COVID-19
- ▶ Initial efforts focused on estimating the value of room & board adjustments; including the timing and logistics for implementation
- ▶ Process initiated to gather preliminary estimates for the impact; when reviewed in conjunction with latest year-end projection, initial solutions developed
- ▶ Analysis of Federal CARES Act continues to assess both the impact and timing

Preliminary Estimate: Impact of Refunding Room and Board

Preliminary refunding of 100% of student fees for unused dining was calculated to be \$1.7M.

(Dollars in Thousands)

Preliminary Refunding Impact

Campus	First Day	Exams End	Weeks	Spring Break	Weeks Remain	Estimated Refund (2)
Amherst	01/21/20	05/07/20	16	Ends 3/20	7	42,700
Boston (1)	01/27/20	05/22/20	17	Ends 3/20	9	1,694
Dartmouth	01/21/20	05/07/20	16	Ends 3/13	8	10,977
Lowell	01/21/20	05/09/20	16	Ends 3/13	8	15,753
Total						71,124

(1) Does not reflect Boston P3 housing

(2) Does not reflect that some students will stay on campus and may not receive any refund

UMB Actual Impact of Room and Board Adjustment

Estimated Adjustment	\$ 1,694
Gross Adjustment	\$ 1,524
Less: Institutional Aid Adjustment	\$ (245)
Net Adjustment	\$ 1,279
<hr/>	
P3 Housing Adjustment*	\$ 2,500

*P3 Housing Adjustment approved by Provident Commonwealth Education Resources, Inc. Board of Directors and administered by residence halls operator, COCM

Preliminary Estimate: FY20 Operating Margin Impact

*Preliminary estimates as of 4/3/2020 that were shared with the Board of Trustees; **does not include an assumption for Federal CARES funding.***

(Dollars in Thousands)

Q2 FY2020 PROJECTION *(as of 12/31/2019)*

Campus	Total Revenue	Total Expenses	OM\$	OM%
Amherst	1,378,046	1,357,814	20,232	1.5%
Boston	440,609	440,609	0	0.0%
Dartmouth	255,658	255,658	0	0.0%
Lowell	502,402	499,626	2,776	0.6%
President's Office	130,921	127,861	3,060	2.3%
Subtotal	2,707,635	2,681,567	26,068	1.0%
Medical School (2)	910,033	887,599	22,434	2.5%
Total	3,537,250	3,488,748	48,502	1.4%

COVID-19 IMPACT: PRELIMINARY ESTIMATES *(as of 4/3/2020)*

Room & Board (1)	Other Impacts	Total Impacts	Initial Solutions	Operating Margin \$	Operating Margin %
(41,650)	(13,800)	(55,450)	15,500	(19,718)	-1.5%
(1,694)	(717)	(2,411)	2,411	0	0.0%
(10,977)	2,473	(8,504)	2,000	(6,504)	-2.7%
(14,620)	(510)	(15,130)	6,785	(5,569)	-1.1%
-	(628)	(628)	2,432	4,864	3.7%
(68,941)	(13,182)	(82,123)	29,128	(26,927)	-1.0%
-	(41,472)	(41,472)	20,520	1,482	0.2%
(68,941)	(54,654)	(123,595)	49,648	(25,445)	-0.7%

(1) Estimate of refunds with an assumption for students who may remain on campus and not receive a refund

(2) UMMS is evaluating the costs of supporting clinical affiliates, partnering with State emergency response teams, developing new research & expanding manufacturing in response to critical needs.

Subsequent FY2020 COVID19 Impact Update

The impact of COVID-19 on the university's budget continues to evolve. As more facts became known in April, the COVID-19 impact was updated.

(Dollars in Thousands)

COVID-19 IMPACT: UPDATED ESTIMATES *(as of 5/1/2020)*

Campus	Room & Board ⁽¹⁾	Other Impacts	Total Impacts
Boston	(1,524)	(1,861)	(3,385)

CARES Act	Workforce Strategies	Other Solutions	Total Solutions
0	100	3,285	3,385

(1) Actuals for refunds processed net of students remaining on campus.

Reasons for this update were:

- ▶ Auxiliary/Other/ESS: -\$1.4 million (further refinement of revenue loss from Dining & Parking, ESS, Health Services, and Other small Auxiliary)
- ▶ Vacation Liability: -1.5 million
- ▶ Further Non personnel reduction: \$1.9 million

This value will continue to be updated until the university's books are closed for FY20

UMB FY20 Third Quarter Projection

(dollars in thousands)

Revenues	Budget FY2020	Q3 FY2020	Projection FY2020	BOSTON		Actual FY2019	Actual FY2018
				Variance (Projection to Budget)			
				\$	%		
Gross Tuition & Fees	247,982	240,917	250,573	2,591	1.0%	245,734	242,813
Tuition Discounts	(65,926)	(68,841)	(69,573)	(3,647)	5.5%	(64,836)	(56,844)
Net Tuition & Fees	182,056	172,076	181,000	(1,056)	-0.6%	180,898	185,970
Grants	56,211	41,474	49,769	(6,442)	-11.5%	53,536	56,212
Sales & Service, Educational	3,962	1,857	1,900	(2,062)	-52.0%	4,312	4,072
Auxiliary Enterprises	13,621	10,346	10,346	(3,275)	-24.0%	12,315	5,199
Other Operating	3,101	1,692	2,112	(989)	-31.9%	2,218	1,758
State appropriations	144,708	102,102	145,635	927	0.6%	140,659	135,605
Other NonOperating	38,863	37,190	39,706	843	2.2%	42,529	37,773
Total Revenues	442,523	366,737	430,469	(12,054)	-2.7%	436,467	426,589

(dollars in thousands)

Expenses	Budget FY2020	Q3 FY2020	Projection FY2020	BOSTON		Actual FY2019	Actual FY2018
				Variance (Projection to Budget)			
				\$	%		
Salaries & Fringe	268,359	189,580	270,152	1,793	0.7%	269,723	269,464
Non-personnel	101,938	78,913	91,580	(10,358)	-10.2%	98,428	98,973
Scholarships and fellowships	17,180	15,804	17,983	803	4.7%	17,983	17,180
Depreciation	33,578	23,864	32,384	(1,194)	-3.6%	28,010	24,433
Interest	21,468	15,114	18,369	(3,099)	-14.4%	16,823	14,152
Total Expenses	442,523	323,276	430,469	(12,055)	-2.7%	430,967	424,202

Operating Margin

UMass OM Calc Revenues	442,523		430,469	(12,054)	-2.7%	434,863	426,589
Total Expenses	442,523		430,469	(12,055)	-2.7%	430,967	424,202
Surplus / (Deficit)	0		0			3,896	2,387
UMass OM Calc	0.0%		0.0%			0.9%	0.6%

Closing the FY20 deficit & ending FY20 with a balanced budget

FY20 budget was projected to be balanced as of Q3 with higher Tuition & Fee than budgeted offsetting higher personnel costs. COVID 19 impacts changed that in the following ways:

Revenue Losses/Expense Increases:

- ▶ Auxiliaries: UHS, Parking & Dining
- ▶ Revenue Funds: ESS (loss of departmental business)/RTF (diminished grant activity)
- ▶ Accruals: vacation/sick liability accrual increase

Solutions to get back to balance:

- ▶ Reduction in costs due to remote instruction/employment
 - ▶ Utilities, shuttle buses, janitorial services, travel expenses
- ▶ Non personnel spending limitation to essential spending only/early close of new requisitions/reduced ProCard limits
- ▶ Reduction in personnel costs
 - ▶ Hiring chill, reduction in temporary and student workers

Staffing Measures Affecting Balanced FY20 Budget

Pre-COVID-19 Contributions to Balanced Budget

VSIP	\$2.2M
Highly paid non-unit salary increase freeze	\$560,000
Total Amount	\$2.76M

COVID-19 Response Actions

Hiring “chill”	\$342,013
03 Reductions	\$250,000
Net student worker reductions	\$275,160
Total amount	\$867,173

Unanticipated Vacation Liability \$1.5M

- Senior staff contribution
- Union negotiations

FY21 Budget Planning – New Planning Timeline

- ▶ Update to the Board of Trustees on COVID-19 impact – April 2020
- ▶ Initial Budget to be Adopted by Board of Trustees – June 2020
- ▶ Start of UMB Fiscal Year, Essential Spending Only – July 2020
- ▶ Ongoing planning and consultation with faculty and staff – Summer 2020
- ▶ FY21 Updated Budget Adopted by Board of Trustees – September 2020
- ▶ FY21 budgets issued – September 2020

FY21 Revenue Budget Planning

Practically Every Budgeted Revenue Line Item Faces Challenge and Uncertainty:

- ▶ **Tuition and Fees**
 - ▶ Dependent on enrollment
 - ▶ Rates to be frozen for FY21
- ▶ **State Appropriation** – state is experiencing a decline in tax revenues
- ▶ **Sales and Services, Educational (ESS)** – largely dependent on amount of activity on campus
- ▶ **Grants**
 - ▶ Uncertainty around availability of governmentally-funded research
 - ▶ Uncertainty from private grantors
- ▶ **Auxiliary Services** - largely dependent on amount of activity on campus

FY21 Planning Approach

- ▶ UMB completed 5-year financial forecast in December of 2019; this was the basis of that reflected the planning assumptions that were used as the FY21 budget process started
- ▶ Revenue budget will be developed to determine what steps need to be planned regarding expenses
- ▶ Some budget planning assumptions are controlled by the University; where possible, those have been reviewed and updated. Other assumptions are still uncertain.
- ▶ To be able to plan for so much uncertainty, a variety of scenarios are being prepared and reviewed to assess operational and fiscal impact
- ▶ Scenarios for operations are presently being developed by various committees. Some of these options will then be incorporated into the budget as more is known about the timing and extent of any activities that can be returned to campus safely
- ▶ Scenarios have to allow the university to achieve a balanced budget

FY21 Updated Planning Parameters

	Forecast <i>(presented December 2019)</i>	Baseline Changes	Decided? <i>(Yes or TBD)</i>
Revenue Assumptions			
State Appropriation	0.0%	5% reduction	
State Collective Bargaining	2.0%	0.0%	Yes: per state guidance
Modeled Tuition: In State UG	2.5% increase	No increase	Yes
Modeled Tuition: Out of State UG	Up to 3% increase	No increase	Yes
Modeled Tuition: Grad	Up to 3% increase	No increase	Yes
Enrollment	1% increase in online only	No increase	Yes
Expense Assumptions			
Collective Bargaining	2.0%	0.0%	Yes: per state guidance
Fringe Rate	37.12%	37.12%	Yes
Payroll Tax	2.60%	2.60%	Yes
Operating Margin	1.0%	Planning for 0%	Yes

Additional Fiscal Planning Scenarios for FY21

Scenario		Brief Description
A	Tuition: Baseline Out of state & grad	Freeze tuition
B	State appropriation: 5%, 10%, 20% reduction	Reduce funding, including fringe, by 5%, 10% & 20%
C	Enrollment: 5%, 10% reduction	Reduce for all categories by 5% & 10% for the <u>full year</u> (impacts tuition, housing & dining)
D	Enrollment: No international	No international students (impacts tuition, housing & dining)
E	Remote Learning: 50% housing & dining for fall semester	Assume remote learning for half the <u>fall</u> semester; reduce housing & dining revenue
F	Remote Learning: 0% housing & dining for fall semester	Assume remote learning for all <u>fall</u> semester; no housing & dining revenue

Additional State Appropriation Reductions Scenarios

FY20 Allocation	<u>Amherst</u>	<u>Boston</u>	<u>Dartmouth</u>	<u>Lowell</u>	<u>Worcester</u>	<u>Central</u>	<u>Total</u>
FY20 TOTAL	268,155,200	99,373,792	63,840,557	87,829,585	40,854,857	-	560,053,991

FY21 Scenarios - 10%	<u>Amherst</u>	<u>Boston</u>	<u>Dartmouth</u>	<u>Lowell</u>	<u>Worcester</u>	<u>Central</u>	<u>Total</u>
10% State Reduction	(26,815,520)	(9,937,379)	(6,384,056)	(8,782,959)	(4,085,486)	-	(56,005,399)
Fringe Impact	(9,929,787)	(3,679,811)	(2,364,016)	(3,252,330)	(1,512,855)	-	(20,738,799)
Total Impact	(36,745,307)	(13,617,191)	(8,748,072)	(12,035,288)	(5,598,341)	-	(76,744,198)

FY21 Scenarios - 15%	<u>Amherst</u>	<u>Boston</u>	<u>Dartmouth</u>	<u>Lowell</u>	<u>Worcester</u>	<u>Central</u>	<u>Total</u>
15% State Reduction	(40,223,280)	(14,906,069)	(9,576,084)	(13,174,438)	(6,128,229)	-	(84,008,099)
Fringe Impact	(14,894,681)	(5,519,717)	(3,546,024)	(4,878,494)	(2,269,283)	-	(31,108,199)
Total Impact	(55,117,961)	(20,425,786)	(13,122,107)	(18,052,932)	(8,397,512)	-	(115,116,298)

FY21 Scenarios - 20%	<u>Amherst</u>	<u>Boston</u>	<u>Dartmouth</u>	<u>Lowell</u>	<u>Worcester</u>	<u>Central</u>	<u>Total</u>
20% State Reduction	(53,631,040)	(19,874,758)	(12,768,111)	(17,565,917)	(8,170,971)	-	(112,010,798)
Fringe Impact	(19,859,574)	(7,359,623)	(4,728,032)	(6,504,659)	(3,025,711)	-	(41,477,599)
Total Impact	(73,490,614)	(27,234,381)	(17,496,143)	(24,070,576)	(11,196,682)	-	(153,488,397)

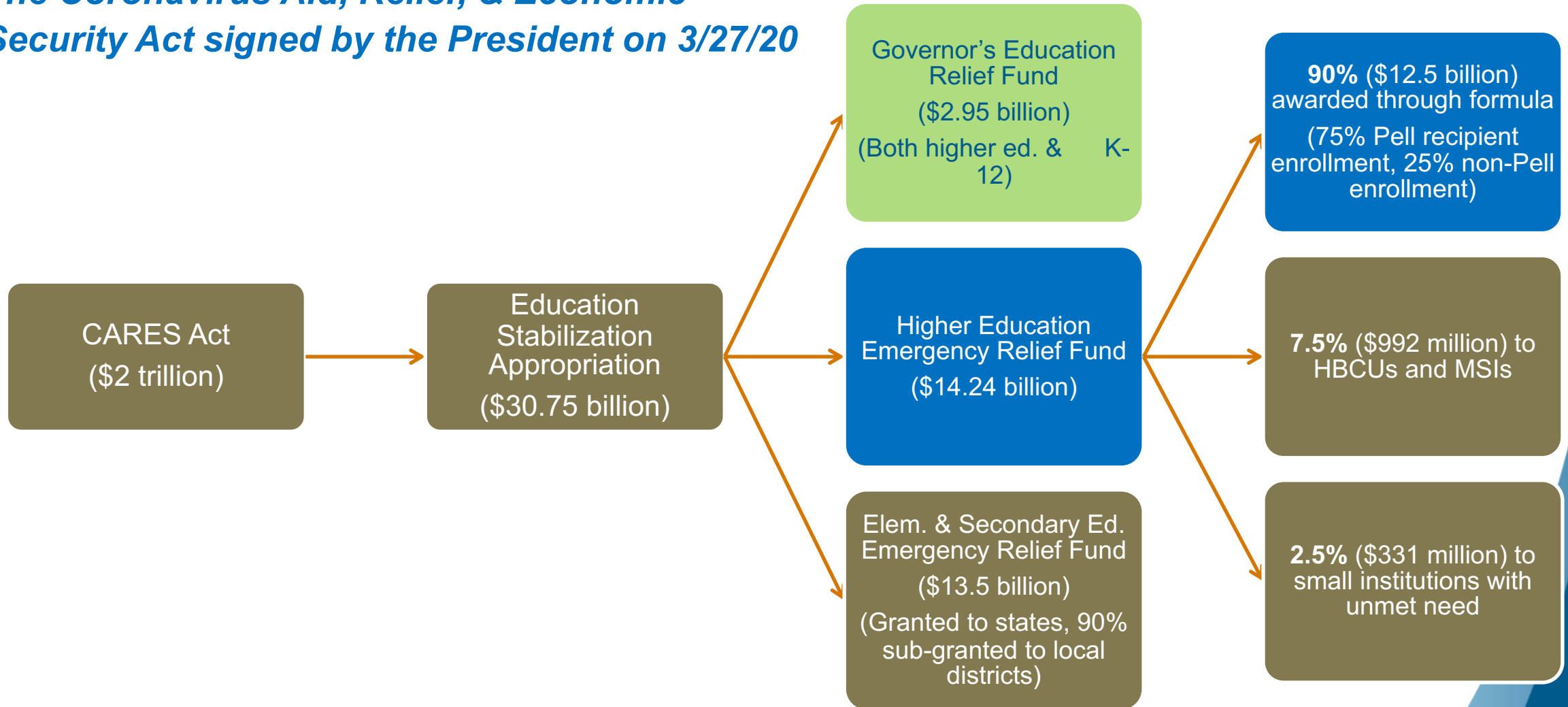
Next steps in the FY2021 Budget Process

- ▶ Continue to develop scenario planning
- ▶ Evaluate and update budget plans as key components of the revenue budget are finalized
- ▶ Evaluate and update budget plans as operational decisions for Fall 2020 semester are made
- ▶ Continue to educate and provide transparency about the university's financial position as it develops and seek input as the process moves forward with
 - ▶ Key university leaders (Faculty Council, Executive Leadership Team, Department Chairs, Union Leaders, Student Leaders)
 - ▶ Faculty Budget and Long Range Planning Committee
 - ▶ F&A Committee, Operations Planning Committees
 - ▶ Campus community

Federal CARES Act

CARES Act Funding for Higher Education

The Coronavirus Aid, Relief, & Economic Security Act signed by the President on 3/27/20



US Department of Education (DOE): Allocation of 90% Funding Share (\$12.5B)

- ▶ U.S. DOE utilized the most recent data from the Integrated Postsecondary Education Data System (IPEDS) and Federal Student Aid (FSA) for this allocation.
- ▶ Funds are being distributed immediately in two tranches: 50% dedicated to student aid and 50% for institutional support.
- ▶ Eligible costs include: “a student’s cost of attendance, such as food, housing, course materials, technology, healthcare, and child care.”

CARES Act Stimulus Funding

(Dollars in Thousands)

Campus	Estimated Total Stimulus	Minimum for Emergency Financial Aid to Students
Amherst	18,335	9,168
Boston	12,185	6,092
Dartmouth	6,288	3,144
Lowell	8,900	4,450
Medical School	310	155
Total	46,019	23,009

Source: U.S. Department of Education

Use of Stimulus Funds for Institutional Costs \$6.092M for UMass Boston

- ▶ Institutions are given wide discretion to address costs associated with significant changes to the delivery of instruction due to COVID-19
- ▶ Funds can be used for applicable COVID-19 related costs incurred during the one year period beginning March 13, 2020
- ▶ Eligible costs include:
 - ▶ Refunds to students for room and board, tuition, and other fees
 - ▶ Technology costs to bolster and support transition to distance learning
 - ▶ Additional financial aid grants to students
 - ▶ Other costs associated with COVID-19
 - ▶ If demonstrably related to disruption to instruction, scholarships for FY21
- ▶ Funds cannot be used for students exclusively enrolled online, contracted pre-enrollment recruiting activities, endowments, or capital outlays related to athletics
- ▶ Spending cannot exceed the amount of student grant awards made

Student Federal CARES Act Support

CARES Act Overview

UMass Boston will receive ~\$6 million in federal funding for direct student aid

- ▶ Federal CARES Act provided over \$12 billion in funding to higher education institutions (HEERF)
 - ▶ Each institution's allocation is divided evenly into an institutional share and a student share
 - ▶ UMass Boston has received **~\$6m for the student share, including ~\$49k for MSI status**
- ▶ US DOE has established guidance for the use of the student share, including:
 - ▶ Funds are intended to be **direct grant aid to students for expenses** related to the disruption of campus operations due to COVID-19
 - ▶ Allowable expenses include food, housing, course materials, technology, healthcare, childcare
 - ▶ Funds cannot be used to pay institutional balances and must go directly to students
 - ▶ Funds must be spent within one year; we aim to spend funds by the end of the calendar year
 - ▶ Students must be eligible for federal financial aid funds to qualify for CARES aid
- ▶ We are committed to doing everything we can to provide equitable funding for students who are not eligible under CARES Act
 - ▶ Recent gifts to Beacon Student Aid Fund and Immigrant Student Fund will help support this work
 - ▶ Staff will coordinate funding to make sure students are connected to appropriate resources

We have implemented an application-based model that allows students with COVID-related expenses to apply for aid during 3-4 windows

➤ **Application Process**

- ▶ Students submit a simple web application to indicate their expenses through checkboxes
- ▶ Application should take no more than 2 minutes to complete and can be completed on a smartphone

➤ **Marketing & Communications**

- ▶ Multiple campus-wide emails have been sent to students, faculty, and staff
- ▶ Link on umb.edu homepage, coronavirus FAQ page, and social media channels
- ▶ Collaboration with affinity groups, campus partners, and student organizations to promote the application

➤ **Funding Windows**

- ▶ Our model estimates the share of funds to be disbursed in each funding window, providing milestones but also enabling flexibility to adjust our strategy if needed based on demand or evolving guidance
- ▶ Exceptions will be considered outside of application windows to meet immediate needs. Students should be directed to The One Stop for assistance

Model reflects pace of spending and target audiences throughout calendar year; timing and amounts can be adjusted

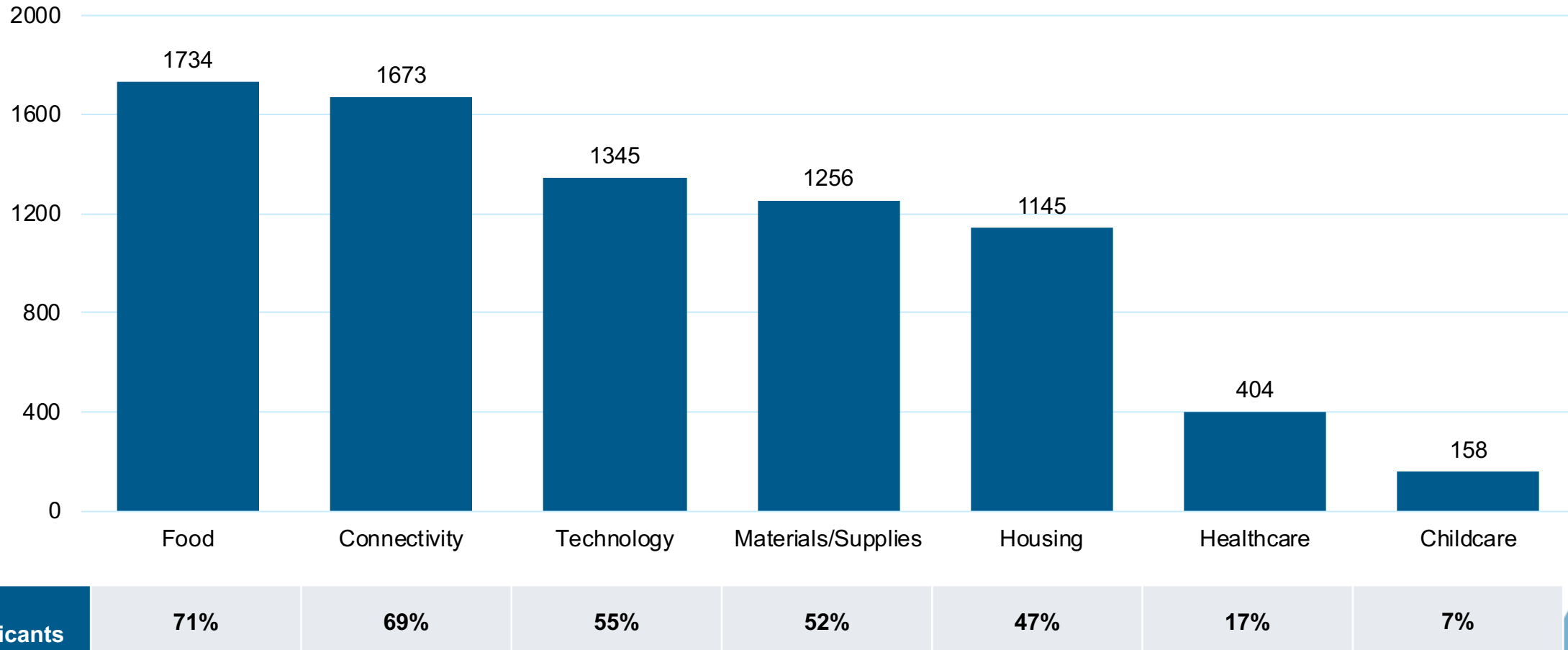
	May/June 2020	August 2020	October 2020	December 2020
Target student groups <i>(illustrative examples)</i>	<ul style="list-style-type: none"> Students enrolled in spring semester or summer I/II Graduating students* Students returned from study abroad Students with technology challenges 	<ul style="list-style-type: none"> Continuing students enrolled in fall or with financial hardships preventing fall registration New incoming students with technology or housing challenges 	<ul style="list-style-type: none"> Students enrolled in fall semester after add/drop (new and continuing) Students with technology challenges 	<ul style="list-style-type: none"> Continuing students enrolled or trying to enroll in spring Graduating students* (December grad) New incoming students with technology challenges
Funding tiers	High need: \$1,200 Moderate need: \$600 Low need: \$300	High need: \$1,000 Moderate need: \$500 Low need: \$250	High need: \$1,000 Moderate need: \$500 Low need: \$250	High need: \$800 Moderate need: \$400 Low need: \$200
Students served	~3,000 students (~28% of eligible)	~3,600 students (~34% of eligible)	~3,600 students (~34% of eligible)	~1,500 students (~15% of eligible)
Funding target	~\$1.8m disbursed <i>(30% of total funds)</i>	~\$1.8m disbursed <i>(30% of total funds)</i>	~\$1.8m disbursed <i>(30% of total funds)</i>	~\$0.6m disbursed <i>(10% of total funds)</i>

*Graduating students are likely only eligible until they graduate (May 29) - any disbursement made to these students will need to happen within the next month

Students have indicated additional expenses related to food, connectivity, and technology related to campus disruption

As of Tuesday, May 12, 2,430 students had applied for CARES Act funding

Qualifying Expenses Indicated by Applicants



Note: Data as of 12pm on 5/12/20; students could select multiple expenses

Planning for Fall

Some assumptions in our planning for the fall

- 1. We will prioritize student, faculty, staff and community health and well-being.**
- 2. We will ensure that when decisions to reopen partially (and beyond) have been made that we are assured of PPE supplies, cleaning at a rigorous standard, and all social distancing provisions are both feasible and followed.**
- 3. We will prioritize students' progress toward their degrees.**
- 4. If/when on-campus activities resume, risk will exist, so we must create options for students and staff.**
- 5. All of our decisions will be based on guidance from public health & government authorities.**

We are actively planning for several possible fall scenarios

Scenario 1:

REMOTE

Scenario 2:

HYBRID of on
campus and
remote

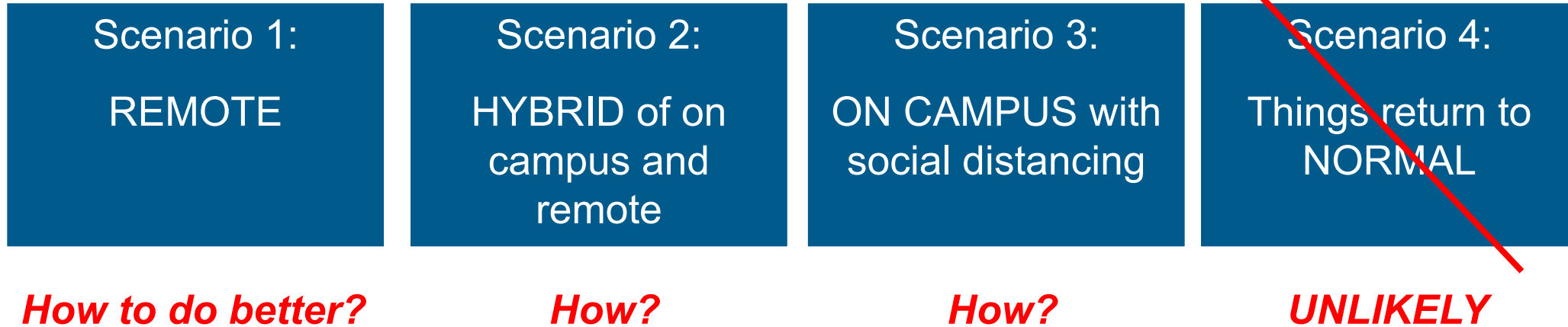
Scenario 3:

ON CAMPUS with
social distancing

Scenario 4:

Things return to
NORMAL

We are actively planning for several possible fall scenarios



Campus activities may return in different ways at different times

	Scenario 1: REMOTE	Scenario 2: HYBRID of on campus and remote	Scenario 3: ON CAMPUS with social distancing
A. Work / Campus Operations			
B. Coursework / Academic program			
C. Campus life and services			
D. Residence Halls			
E. Research			

Two key questions will drive which activities are highest priority to return to campus

1

Is social distancing feasible?

YES

	<i>Highest priority to resume on campus</i>
<i>Lowest priority to resume on campus</i>	

NO

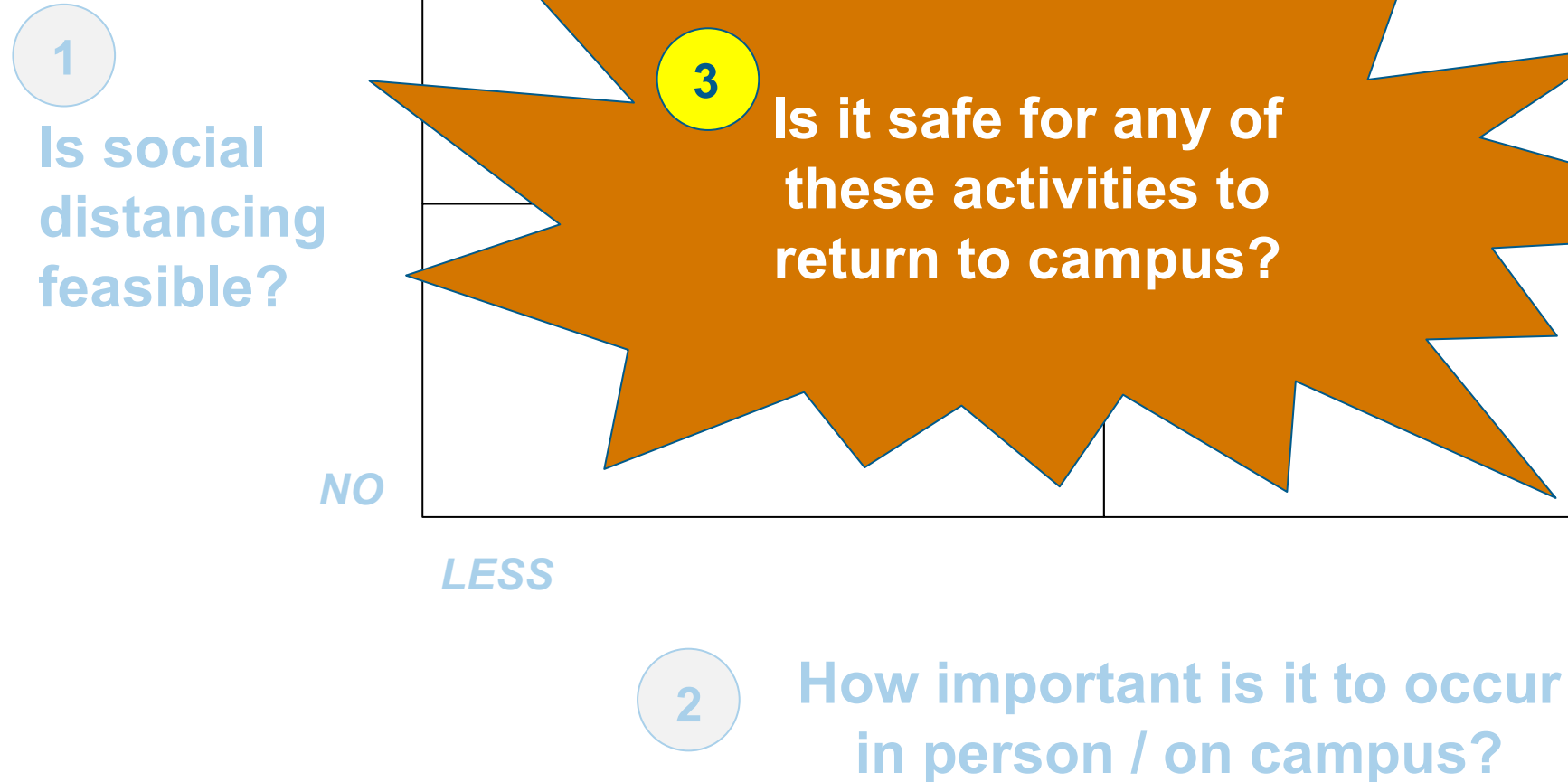
LESS

MORE

2

How important is it to occur in person / on campus?

And a critical third question will determine how many activities return to campus



A set of committees is diving deep on these planning efforts

1

Safety & Recovery

Co-chairs: Director of Environmental Health & Safety and Manager of Emergency Planning
Members: Human Resources, UHS, Facilities, UMBPD, ODEI, Communications

2

Academics

Chair: VC of Academic Affairs
Members: Deans, Faculty, IT, Registrar, Facilities

3

Campus Life

Chair: VC of Student Affairs
Members: Dean of Students, Facilities, Campus Services, Athletics, IT, UHS, Emergency Management, Students

4

Research & Scholarship

Chair: VC of Academic Affairs & Vice Provost of Research
Members: Deans, Faculty, IT, ORSP, EHS, Facilities

5

Human Resources

Chair: VC of Human Resources
Members: A&F, Academic Affairs, Chancellor's Office

6

CARES Act

Co-chairs: Assistant VC of Enrollment Management, Special Assistant to the Chancellor
Members: A&F, Student Affairs, Grad Studies, Academic Support Services, Government Affairs

7

Enrollment & Student Success

Chair: VC of Enrollment Management
Members: Admissions, Grad Studies, IR, Budget & Financial Planning, Financial Aid, Academic Support Services, Registrar, Dean of Students

Academic/Research Summer and Fall Planning

Planning for Academic and Research Continuity

- ▶ Deans' Council Planning Process to date
 - ▶ Spring 2020 – student accommodations, faculty accommodations and trainings, research ramp-down
 - ▶ Summer 2020 – decision to go remote; faculty opt-out; faculty training availability
 - ▶ Preliminary fact-finding to inform scenarios for Fall.
- ▶ Next phase of planning (now through summer)
 - ▶ Academic Continuity Committee: to include Deans' Council reps, faculty reps, Faculty Council/college governance/BLRP reps, FSU/DCU reps, A&F reps
 - ▶ Planning structures still TBD (subject in part to impact bargaining with FSU and DCU)
 - ▶ Goals:
 - ▶ To develop and refine nimble evidence-based AY2020-21 scenarios
 - ▶ To assure students a top-quality academic experience
 - ▶ To make recommendations regarding best academic practice, training opportunities for faculty
 - ▶ Research Continuity Committee: to include Deans' Council reps, faculty reps, governance reps
- ▶ Update: NTT Non-Reappointments

Greetings from Dr. Marcelo Suárez-Orozco

Questions?

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