



First Regular Meeting
2020-2021 Bradley University Senate
3:10 p.m., Thursday, September 17, 2020
via
Zoom



MISSION:

Bradley University empowers students for immediate and sustained success in their personal and professional endeavors by combining professional preparation, liberal arts and sciences and co-curricular experiences. Alongside our dedication to students, we embrace the generation, application and interpretation of knowledge.

I. Call to Order

II. Announcements

0. The meeting is being recorded
1. Welcome back
2. There are vacancies on the Faculty Grievance Committee. Please forward names of individuals willing to serve to a member of Senate Exec.

III. Approval of Minutes

- A. Seventh Regular Meeting of the 2019-02020, April *
- B. Eighth Regular Meeting of the University Senate, May 6, 2020 *
- C. Special Meeting of the 2020-2021 University Senate, May 6, 2020 **
- D. Special Meeting of the 2020-2021 University Senate, July 16, 2020 **

*separate attachment. ** included below

IV. Reports from Administrators

- A. President Standifird
- B. Senior Vice President of Academic Affairs and Provost Zakahi
- C. Senior Vice President and Chief Operating Officer Blade

V. Report from Student Body President Emma Hoyhta

VI. Reports from Standing Committees

A. Curriculum and Regulations Committee:

1. Consent Agenda:

194855	Course Addition	I M IM 526 Practicum
194856	Course Addition	I M IM 580 Game Seminar
194857	Course Addition	I M IM 588 Game Prototyping & Pre-Production
194858	Course Addition	I M IM 589 Game Production
194859	Course Addition	I M IM 590 Game Post-Production
194208	Program Addition	I M Master of Science in Game Design & Development
196428	Major Addition	LAS General Studies Major in Liberal Arts & Sciences
197352	Major Addition	SEI Interdisciplinary Innovation

- 2. Academic Calendars -- See below.
 - a) 2023-2024 Academic Year (on campus)
 - b) 2023-2024 Distance Delivery Semesters
- 3. Prerequisite changes – See below for details.
 - MTH 109 - College Algebra
 - MTH 112 - Precalculus
 - MTH 114 - Applied Finite Mathematics
 - MTH 115 - Brief Calculus with Applications I
 - MTH 120 - Discrete Mathematics
 - MTH 121 - Calculus I
 - CHM 104 - Essentials of General Chemistry
 - CHM 110 - General Chemistry I
- 4. Approval of Ahmad Fakheri as Chair of C&R

B. Senate Executive Committee

- 1. Motion to change the Faculty Handbook to allow the Equity and Diversity Committee to elect its Chair.

Faculty Handbook, page 27

14. The Committee on Diversity and Equity

(Revised on April 18, 2002, October 18, 2018, and on November 15, 2018)

1. The function of the Committee on Diversity and Equity shall be to review and, where appropriate, recommend practices and policies for the purpose of (a) enhancing the diversity of the faculty and student body through recruitment, retention, and other appropriate strategies, and (b) protecting individuals from discrimination and harassment based on age, color, creed, disability, ethnicity, gender, gender identity and expression, marital status, national origin, race, religion, sex, sexual orientation, gender identity and expression or veteran status. The Committee shall make recommendations to the University Senate and to the administrative officers involved in the implementation of affirmative action policies. To accomplish its objectives, the Committee shall periodically solicit and review reports from administrative officers, University Senate, university committees, and others involved in diversity and affirmative action policies. [L]
[SEP]
2. The Committee shall be composed of nine members. Six members shall be appointed by the Executive Committee subject to approval by the Senate, one of whom, a Senate member, shall be designated as Chairperson. One member shall be appointed by the Provost and Vice President for Academic Affairs and one member by the Vice President for Legal Affairs. One member shall be a student selected by the Student Senate. Appointments are for three-year renewable terms with staggered terminations. [L]
[SEP]
3. The Committee shall elect its own Chairperson and establish its internal operating procedures and those procedures shall be made available to all full-time faculty.

V. New Business

VI. Adjournment

**ACADEMIC CALENDAR
2023 - 2024**

FIRST SEMESTER

August 14, Monday	Reporting date for faculty
August 19, Saturday	Residence halls open
August 23, Wednesday	Classes begin
October 7, Saturday	Fall Recess begins
October 11, Wednesday	Classes resume
November 22, Wednesday	Thanksgiving Recess begins (no classes)
November 27, Monday	Classes resume
December 5, Tuesday	Last day of classes
December 6, Wednesday	Study Day
December 7, Thursday	Final Examinations begin
December 13, Wednesday	Final Examinations end
December 16, Saturday	Commencement

JANUARY INTERIM

January 2, Tuesday	First day of classes
January 15, Monday	January Interim Ends

SECOND SEMESTER

January 8, Monday	Reporting date for new faculty
January 14, Sunday	Residence halls open
January 17, Wednesday	Classes begin
March 9, Saturday	Spring Recess begins

2023-2024, continued

SECOND SEMESTER, continued

March 18, Monday	Classes resume
April 30, Tuesday	Last day of classes
May 1, Wednesday	Study Day
May 2, Thursday	Final Examinations begin
May 8, Wednesday	Final Examinations end
May 11, Saturday	Commencement

SUMMER SESSIONS

May 13, Monday	May Interim I begins May Interim II begins
NO CLASSES on Memorial Day Holiday	
May 31, Friday	May Interim I ends
June 3, Monday	Summer Session I begins
NO CLASSES on Fourth of July Holiday	
July 5, Friday	Summer Session I ends May Interim II ends
July 8, Monday	Summer Session II begins
August 9, Friday	Summer Session II ends

Undergraduate Catalog 2020/2021

Course Description pre-requisite modifications as a consequence to the adoption of ALEKS as our online math placement assessment

DRAFT (6-9-2020)

From A. Kinder's records

Senate President (M. Timm) approved a modification to the C&R approval process: *"We decided that given the extraordinary conditions of the present moment, it is OK to implement the changes now, then ask the Senate to act at the September meeting. We also decide that the changes should be entered into CRCRS now, with a bit of explanation, so that it is clear that the intention is to respect Senate processes."*

Approvals needed for pre-requisite modifications:

1. Appropriate department chairs
2. LAS Dean or designee
3. C&R Chair (Provost)
4. Once approved by the Provost, the revisions will be forwarded to Registrar

IMPACTED COURSES

MTH 109 - College Algebra (3 hours)

For students who need to strengthen their algebra skills: factoring polynomials; solving quadratic and other equations; exponents, logarithms, and graphing. Prerequisite: ~~The sum of the mathematics placement exam score and the mathematics ACT score (or a converted mathematics SAT score) is at least 35.~~ The mathematics placement exam score is at least 46.

MTH 112 - Precalculus (4 hours)

For students needing further background in mathematics before enrolling in calculus (especially MTH 121). Thorough study of algebraic, transcendental, and trigonometric functions; emphasis on graphing and use of algebra. Prerequisite: Grade of C or better in MTH 109; or ~~the sum of the mathematics placement exam score and the mathematics ACT score (or a converted mathematics SAT score) is at least 45.~~ the mathematics placement exam score is at least 61.

MTH 114 - Applied Finite Mathematics (3 hours)

Core Curr. QR

A survey of the most common mathematical techniques used in business. Topics include: linear functions, non-linear functions (polynomials, exponentials, logarithms), systems of linear equations, linear programming, sets and probability, introduction to basic statistics. Prerequisite: Grade of C or better in MTH 109 or 112; or ~~the sum of the mathematics placement exam score and the mathematics ACT score (or a converted mathematics SAT score) is at least 45.~~ the mathematics placement exam score is at least 61.

MTH 115 - Brief Calculus With Applications I (4 hours)

Gen. Ed. MA

Core Curr. QR

Differential and integral calculus with emphasis on understanding through graphs. Topics in analytic geometry, limits, derivatives, antiderivatives, definite integrals, exponential and logarithmic functions,

and partial derivatives. Prerequisite: Grade of C or better in MTH 109 or 112; or ~~the sum of the mathematics placement exam score and the mathematics ACT score (or a converted mathematics SAT score) is at least 45.~~ the mathematics placement exam score is at least 61.

MTH 120 - Discrete Mathematics (3 hours)

Introduction to graph theory, Boolean algebra, mathematical induction, and elementary combinatorics. Prerequisite: Grade of C or better in MTH 112; or ~~the sum of the mathematics placement exam score and the mathematics ACT score (or a converted mathematics SAT score) is at least 50.~~ the mathematics placement exam score is at least 68.

MTH 121 - Calculus I (4 hours)

Gen. Ed. MA

Core Curr. QR

Topics in analytic geometry; limits; continuity; differentiation; introduction to integration; applications. Prerequisite: Grade of C or better in MTH 112; or ~~the sum of the mathematics placement exam score and the mathematics ACT score (or a converted mathematics SAT score) is at least 56.~~ the mathematics placement exam score is at least 76.

MTH 109 - College Algebra (3 hours)

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MTH 112 - Precalculus (4 hours)

For students needing further background in mathematics before enrolling in calculus (especially MTH 121). Thorough study of algebraic, transcendental, and trigonometric functions; emphasis on graphing and use of algebra. Prerequisite: Grade of C or better in MTH 109; or the mathematics placement exam score is at least 61.

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Differential and integral calculus with emphasis on understanding through graphs. Topics in analytic geometry, limits, derivatives, antiderivatives, definite integrals, exponential and logarithmic functions, and partial derivatives. Prerequisite: Grade of C or better in MTH 109 or 112; or the mathematics placement exam score is at least 61.

MTH 120 - Discrete Mathematics (3 hours)

Introduction to graph theory, Boolean algebra, mathematical induction, and elementary combinatorics. Prerequisite: Grade of C or better in MTH 112; or the mathematics placement exam score is at least 68.

MTH 121 - Calculus I (4 hours)

Gen. Ed. MA

Core Curr. QR

Topics in analytic geometry; limits; continuity; differentiation; introduction to integration; applications.

Prerequisite: Grade of C or better in MTH 112; or [the mathematics placement exam score is at least 76](#).

CHM 104 – Essentials of General Chemistry (3 hours)

Core Curr. NS

This course is designed to prepare students for CHM 110 or to be utilized as a Bradley Core Curriculum course. Topics include: mathematical concepts used in General Chemistry; atomic structure; periodic properties; inorganic nomenclature; chemical reactions; stoichiometry; chemical bonding; basic thermochemistry; properties of solutions; acids and bases, chemical kinetics and equilibrium. May not be counted for credit in programs offered within the Department of Chemistry and Biochemistry; not open to students with credit in CHM 110. Prerequisite: ~~The sum of the mathematics ACT score or a converted mathematics SAT score and the mathematics placement exam score is at least 35.~~ [The mathematics placement exam score is sufficient for placement into MTH 109.](#) Corequisite: MTH 109

CHM 110 – General Chemistry I (3 hours)

Gen. Ed. FS

Core Curr. NS

Course designed to provide chemical concepts for students majoring in the physical or biological sciences, engineering, or related disciplines. Topics include: measurements; basic inorganic nomenclature; atomic structure; stoichiometry; types of reactions; thermochemistry; periodic properties; molecular structure and bonding; properties of gases, liquids, solids, and solutions; acids and bases. Prerequisite: ~~The sum of the mathematics ACT score or a converted mathematics SAT score and the mathematics placement exam score is at least 45 or C or better in MTH 109~~ [The mathematics placement exam score is sufficient for placement into MTH 115;](#) high school chemistry or C or better in CHM 100 or CHM 104.



**Bradley University Senate
Special Meeting of the 2020-2021 Senate**

4:00 p.m. – 5:00 p.m., May 6, 2020

Online (Zoom Meet)

MINUTES



MISSION:

Bradley University empowers students for immediate and sustained success in their personal and professional endeavors by combining professional preparation, liberal arts and sciences and co-curricular experiences. Alongside our dedication to students, we embrace the generation, application and interpretation of knowledge.

Agenda

I. Call to Order

Ahmad Fakheri, Senate President (2019-2020), called the special meeting to order at 4:13 PM.

II. Election of Senate Officers

Andrew Kelley, Chair of Senate Election Committee, called motions to elect senate officers.

Senate President:

Steven Banning (Motion: Senator Daniel Matisa; 2nd : Senator Brent Wiley)

Mathew Timm (Motion: Senator Ahmad Fakheri; 2nd: Senator Tony Bedenikovic)

Voting result: Mathew Timm was elected as Senate President (2020-2021)

Senate Vice President:

Teresa Drake (Motion: Senator Cecile Arquette; 2nd: Senator Rachel Vollmer)

Danielle Glassmeyer (Motion: Senator Palakeel) ; Glassmeyer declined the nomination

The motion carries unanimously.

Senate Secretary

Yufeng Lu (Motion: Senator Ahmad Fakheri; 2nd: Senator Alexander Malinowski)

The motion carries unanimously.

Senate Executive Committee At-large member (2)

Eden Blair (Motion: Senator Travis Stern; 2nd: Senator Kimberly Mitchell)

Ethan Ham (Motion: Senator Tony Bedenikovic; 2nd: Senator Bernard Goitein)

The motions carry unanimously.

III. Confirmation of Senate Committee Memberships

IV. Summer Senate Meetings

Mat Timm thanked Ahmad Fakheri for his service in the last term.

Motion: Mat Timm; 2nd: Matthew O'Brien. The motion carries unanimously.

Mat Timm also commented that there will be advisory senate meetings for discussion and advise during the summer of 2020. These meetings are not mandatory. They are mainly for engaging discussion during the trying times.

The senate represents faculty, staff and administrative officers, to the university community and the broader society.

V. Adjournment

At 4:33 PM.

Submitted by:

Yufeng Lu, Secretary of the Senate



Bradley University Senate

Special Meeting of the 2020-2021 Senate

3:10 p.m. – 5:00 p.m., July 16, 2020

Online Meeting

Minutes



MISSION:

Bradley University empowers students for immediate and sustained success in their personal and professional endeavors by combining professional preparation, liberal arts and sciences and co-curricular experiences. Alongside our dedication to students, we embrace the generation, application and interpretation of knowledge.

Agenda

I. Call to Order at 3:16

Senate President Mat Timm thanks the tech support team and all committees for their work and announces that there will be a senate meeting on August 20th 3:10 PM – 5 PM. The meeting will have business items, curriculum and regulation items (some from last academic year, and some from the new opportunity committee).

Updates: On August 17th 2020, it was announced that there won't be a special senate meeting on August 20th. Those items from the C&R committee are not yet ready for review by the full senate.

II. Reports from Administrators

A. President Stephen Standifird

- Pres. Standifird thanks everybody for extraordinary work done by all and appreciates these work effort to keep things going to a positive direction. In past 10 weeks, there have been two major items. one is reduction, the other is return to campus plan.

For Reduction, two big issues have been dominated in conversations, which need attention right away. One is the immediate issue related to COVID19. The other is to quickly understand the challenge and work towards a balanced budget for Bradley University. We are committed to put a strong finance foot. The CFO Jeff will specifically talk about the finance position. Pres. Standifird wants to highlight the overall. Planning advisory group, Ad Hoc committee group, and other groups have been working on these issues. Bradley needs to navigate the challenge first and financially move to a right direction. The university also needs to preserve the Bradley culture as much as possible.

There were a lot of thinking on how to make reduction. Permanent and one-time changes have been taken into consideration. We decided to have voluntary separation program (VSP) first and try to have it as much as possible and open it up widely. In a good way, there was a fair strong participation of VSP. We are able to do less involuntary separation than we anticipated.

In one of VSP information session, I misspoke about “guided by, but not bound by the handbook” and got a strong feedback on that. We were able to go with reduction in the way more in line with the handbook, at least in spirit. Those individuals in those eliminated positions will be able to complete the upcoming academic year. However, their contracts will not be renewed at the completion of the 2020-2021 academic year.

Question: What are details about reduction? (from zoom chat)

Answer: Pres. Standifird: when we talk about specifics about what we have on positions, we would like to have transparency, countability, and respectfulness. There should be “exit with integrity”. Some individuals in those positions asked for privacy. The board of trustee does not have the detailed information either. What I can share is that every area of the university is impacted. All positions in VSP and involuntary positions present indentially different areas. There are about 69% personnel in academic affair. It happened at all levels. VP in marketing took the VSP. Everybody is taking a bite on this. We are not replacing those positions. All of these are designed to treat it as a permant reduction.

B. CFO Jeff Blade: We met the BOT in May. In the past 10 weeks or so, we have been working on putting an operating budget for AY2020-2021, and trying to have milestones to build different scenarios for what happen related to the COVID19 and continue minimizing the deficit gap.

The Chronicle of Higher Education projected that 25% students won't return campus in the Fall. \$40 M deficit is anticipated if 20% revenue decline. The enrollment number of Bradley University has been strong. The number is flat compared with the one from prior year. It is better than we anticipated. We are checking every line of budget and work closely with the enrollment management. We communicated with the BOT in June 2020. To close all deficit, it would include drast changes including reduction in salary and retirement contribution. Instead we have the approval from the BOT to keep the deficit ranging from \$5 M to \$7 M in FY2021 and plan to close the deficit gap in two years. We will continue to look into operational efficiency under the suggestion of consulting company, and find new program opportunity to benefit the university. Efforts are underway right now to identify and approve new programs.

Bradley development have been modest. We are having a comprehensive review with consulting company and working on acclerating Bradley development. We anticipate to balance budget in two years and preserve the long term vitality of the university.

Question: Bill Bailey: What does the cash flow look like?

Answer: CFO Jeff Blade : There were some concerns. In March 2020, the endowment funds were significant hit by the market drop due to the pandemic. Fortunately the market bounced back quickly, which did not trigger the covenant issue with bonds. The budge deficit for fiscal 2020 was \$10 M – \$15 M. Academic institutes have low cash flow during July – August and Dec – Janury. July-August is the time when spending ramps up before the tuition comes in. The enrollment of Bradley has been strong. Pratima did an outstanding job in Spring 2020 to shut down non-essential spending and those spending when students were not around. The saving is higher than anticipation.

Question: Teresa Drake : there is a question from the chat about the Huron report. It was not shared with the faculty community. What are the recommendations? How much saving?

Answer: CFO Jeff Blade: Huron report focus on IT , finance, HR and the market. The work was trunated by the pandemic. They are still in the process of compeleting recommendations. They are asked to finish the work and continue to make more recommendations based on the pandemic impact.

Question: Kris Mailacheruru: : what was the breakdown of faculty voluntary separation by college?

Answer: Pres. Standifird: 63 total including 17 faculty.

Question: Kris Mailacheruru: New program opportunities, what are they?

Answer: Pres. Standifird: There is a process to go with it . Walter will address it later.

B. Senior Vice President of Academic Affairs and Provost Walter Zakahi

Provost. Zakahi: The important aspect of our plan is to generate new programs in order to generate revenue. We follow the survive and thrive model. Chris Jones led a group and spent 3 – 4 months in generating a check list for new programs for consideration. It includes three areas: strategic alignment, financial viability and program execution. New programs should demonstrate evidence on all three areas. Degree related programs will be proposed to the senate in the August senate meeting. Curriculum and regulation committee will review them before the the senate meeting.

Pres. Standifird: Chris Jones has done a really good job. Ideas are from everywhere including the ad-hoc committee.

Chris Jones: There are 400 students left with a few credit hours away from degree completion. An online pathway to complete bachelor degree in general study could be offered. Other ideas were discussed such as : transformative education opportunity: establish Lydia Moss center, new tuition price model, double down with the relation with OSF etc. For moving forward programs, there is a proposal process. Talk with the Dean of your college. Those programs could be online Bradley grown program, continue education, certificate program and etc. President and CFO will review them before they are sent to the curriculum and regulation committee.

Question: Burl George: Do we have a breakdown on those did not get degree?

Answer: Pres. Standifird: We don't have the breakdown data. There are some good ideas in the white paper from the ad-hoc committee such as financial transparency , more accountable accounting system, and inclusive excellence. Jeff and I love the idea of inclusive excellence. Our finance is messy. It is an understatement. We are really aggressive to get the financial data cleaned up. We don't release them until we get confident that the data is accurate. Resource will be allocated to the new programs. I can see it could be a concern. All of these are still in the early process. Through quick win programs and advancement, we should be able to grow the pie, instead of taking away resources. It's not a zero-sum game.

Note: On August 17th 2020, Chris Jones (LAS dean) and Andy Kindler (the registrar) had email communications with Burl George and senate executives. In the August C&R meeting, the Office of the Registrar generated a lengthy list of students who over the course of many years had left Bradley University with a substantial number of credit hours earned but before securing graduation. If the list can be shared more broadly, the information will be attached as a part of this meeting minutes.

Question: Mat Timm: (read from the zoom chat): Is there any possibility of involuntary separation in the AY2020-2021?

Answer: Pres. Standifird: we have done what we need to do. It is not our intention to have involuntary separation. we will look for efficiency.

Question: Daniel Glassmeyer: Can you clarify that the 12 people who were decided to cut from Bradley family not because of COVID, but because of long term structural deficit?

Answer: Pres. Standifird: It is a little of both.

Question: Kristi McQuade: We don't fully understand the \$10M deficit at the first place. We have lost valuable colleagues. The teaching load has been increased. What's the plan for next year?

Answer: Provost. Zakahi: We suspended expenditure in adjunct positions. faculty load will be returned to the way we have been. We will quickly get back to staff in appropriate areas based on enrolled students. It may not be as fast as we expect. We won't get back to the same position. Need demonstrate real need for part time positions.

Pres. Standifird: The ad hoc committee has documented these nicely. The financial data has been messy. Thanks for CFO Jeff's team and the data analysis from the ad hoc committee. We need to pay attention to financial discipline. We should not all the sudden find out we are in the same position again. There are a lot of inefficiency in the process. We are thoughtfully tacking about this.

Question: Jeanie Bukowski: There are two questions from the chat:

- (1) The Handbook states on p. 109 that, "The overriding consideration in preparing and recommending a plan for responding to a state of financial exigency shall be the preservation of Bradley University as a viable institution of higher learning without impairment of the academic standing of the University." Can you make an argument that terminating faculty will not impair the academic standing of the university?
- (2) What's the cause of structural deficit and financial problem? According to the URC report, it was not caused by instructional cost.

Answer: Pres. Standifird: I don't think the data is clean enough to tell that instructional cost caused or not caused the structural deficit. We should be cautious to suggest instructional or non-instructional. I think it is every where. Initially we thought this way. We talked with VPs. There were some cut in past years. Certain area was dangerously lean. **CFO Jeff Blade:** It is cross enterprise. Budgeting process is not strong. We need to increase transparency. It does not guide. There are a lot of sloppiness and it lacks of accountability.

Question: Mat Timm: What about athletic programs? There have been a lot of questions on them.

Answer: Pres. Standifird: no body is immune. They are impacted as well.

III. Report from the Ad Hoc Senate Committee (formed at the May Senate Meeting)

Jeanie Bukowski (Ad-hoc Committee Chair): We already have talked about some items and will leave some time for discussion.

Please see the attached files:

Summary document – Ad-Hoc report to Senate

- (1) Senate ad hoc committee message to the BOT and leadership (5/15/2020)**
- (2) White Paper (revised Appendix 2 with information from the graduate school)**
- (3) Statement on Bradley Student Engagement**
- (4) Senate Recommendations**

The charge of this committee is to identify practical cost savings, revenue enhancements, and other financial opportunities which will lead to short- and long-term success consistent with Bradley's core values and academic mission. The committee was formed to have a faculty voice in the rapidly-moving discussions, drawing on expertise from the URC and other Senate Standing Committees.

The Committee's output includes a White Paper entitled "Strategies for Overcoming Short-Term Challenges and Thriving into the Future" and a statement on student engagement. We also note forward movement on two of the Committee's recommendations, a Lydia Moss Bradley Center for Transformational Education and a working group to examine tuition/pricing. The Committee's response to the announcement on July 8 of the elimination of 12 non-tenured faculty and staff positions was read:

We understand the challenges presented by the structural deficit and Covid-19. However, given our data-based recommendation that cuts to the instructional core run the risk of hampering Bradley's longer-term success, we are very troubled by these involuntary separations. The potential negative impacts of these cuts are exacerbated by a lack of clarity regarding the basis on which the 12 positions were selected. We reiterate our strong caution that cuts to the instructional core undermine Bradley's ability to succeed.

The Committee appreciates the President's comments on preserving Bradley's culture, but notes that these cuts also have the potential to harm our market position. One of the guiding principles in our work is that short-term decisions must not undercut our ability to succeed in the longer term, and we demonstrate in the White Paper the risk involved in making further cuts to the instructional core.

We also maintain that short- and long-term decision making must be informed and supported by high-quality data and strategic analysis, and aligned with Bradley's core identity and mission. It is also crucially important to establish a culture of trust and accountability—based on transparency in decision-making and clarity in communication at all levels, from the Board of Trustees on down.

There are four sections in the White Paper. The first is an analysis of our current financial situation, examining how we got to this point, with the goal of remedying the problems that led to this situation. We note that while Covid-19 must now be considered in Bradley's plan for recovery, our current financial problems are not due to the pandemic. Rather, there are a variety of factors and decisions resulting in losses starting in 2016, which the URC was able to determine through analysis of Bradley's public audited financial statements. A comparison with Butler is instructive here (Table 1 in the White Paper), and shows Bradley with lower net tuition, contributions, and operating income, higher administration and general expenses, and lower instructional, and academic and student support spending. We note that Butler is also transparent in providing a clear line item for the Athletics budget. We recommend that BU implement a

contemporary, transparent budget process that sets benchmarks and drives accountability across all units in the University.

The second section of the White Paper analyzes what the Committee sees as the basis for Bradley's excellence: our stated vision to be the leader in student engagement. Bradley's niche in the market is to relentlessly deliver a transformational learning experience. In order to pursue this vision effectively, the Committee recommends action by the BU Strategic Planning Committee, and enhanced engagement between the Senate Executive Committee, member of the higher Administration, and the Board of Trustees.

The third section provides an analysis of the instructional core as necessary for high-quality student engagement. Classroom instruction is the profit center for universities, and instruction costs do not appear to contribute to Bradley's structural deficit. A key focus of immediate-term decision making has involved improving faculty operating margins by increasing teaching loads, reducing benefits, and terminating positions through voluntary and involuntary separations. Even before the involuntary separations, IPEDs data reflected a 15:1 student-to-faculty ratio, compared to all the top 10 schools in the *US News and World Reports* rankings of Midwest regional institutions of 12:1 or lower. This is a risky strategy given our point of distinction in the higher-education marketplace, in that such cuts undermine our ability to deliver on our demonstrated commitment to student engagement and high-quality classroom instruction. Based on the limited financial data to which the Committee had access, we identified anticipated savings from the cuts to the instructional core already made for AY2020-21 (approximately \$8 million); identified additional cost-saving measures for the shorter-term (\$5-10 million); and presented ideas for longer-term strategic initiatives in line with our vision (with the potential for an estimated \$11 million in new revenues). The goal is to provide *alternatives* to further cuts to the instructional core.

The fourth section expresses concern with the stated strategy of "accessible excellence," given that market research shows that "accessible" usually means "affordable," or "bargain". The White Paper analysis demonstrates that BU cannot compete on the basis of price. The Committee thus recommends that we shift the focus to "inclusive excellence", building a market strategy that differentiates Bradley as a high-quality comprehensive university, building on our core strengths and vision, while at the same time strengthening our commitment to diversity, inclusion, and equity.

The Ad Hoc Committee also provides several specific recommendations for Senate action, through the BUSPC, the URC, Curriculum and Regulations, and the Tenure, Promotion and Dismissal Committee.

Question: Graduate Dean Jeff Bakken: I am disappointed about some inaccurate or missing information. The graduate school should be a part of process and could supply more input.

Answer: Ad-hoc Committee representatives: Jeanie Bukowski, Brad Andersh, Jackie Hogan: The recommendations re: the Graduate School contained in Appendix 2 drew from campus discussions and reports that have been around for some time. Given the charge of the Ad Hoc Committee to identify cost savings, the rapidity with which decisions on cuts were being made, and the fact that we did not have specific amounts in terms of alternative cost savings that

would be necessary to avoid cuts to the instructional core, we tried to put as many options on the table as possible. The Committee's recommendations centered on providing analysis of how current Graduate School functions could be devolved *if* a decision were made to eliminate the Graduate School. It did not recommend elimination of graduate programs, and also noted the importance of the Office of International Student and Scholar Services, referencing the Senate Standing Committee on International Initiatives report. We apologize for any errors or omissions.

Updates: On July 17 2020, the Ad Hoc Committee submitted a revised version of the White Paper that contains modifications in Appendix 2. It includes corrected information regarding Graduate School functions, pursuant to the concerns raised in the Senate meeting by Dean Bakken, and using information provided by Rachel Webb. Specifically, the modified section, including a Note stating that corrections were made, appears on pp. 17-18 of the White Paper document. The rest of the document remains unchanged.

Question: Danielle Glassmeyer: Thanks for the hard work of Ad Hoc. Rather than long term, inclusive excellence perhaps we should also think short term. The digital divide is real. We should ensure students are well supported in terms of digital education. There is a concern that students may have to figure out which class will be on Sakai or Canvas, online or face-to-face, Tuesday or Thursday. We should make a judgement call to simplify this potential schedule madness.

Answer: CIO Zack Gorman: We are working on a plan to have Sakai linked to Canvas, and increase bandwidth. We will meet the goal in next couple of weeks. VP Student Affairs Nathan Thomas's team is also working to ensure residential halls are up to the speed.

Pres. Standifird: It is a wicked, complex problem. There is no good answer. We try to make it as simple for students as possible. There are a lot of good suggestions in the Ad hoc report. Jeff and I are totally energized by inclusive excellence and transformational learning.

Question: Jeanie Bukowski: There are questions from the Zoom chat:

What role is Bradley Athletics playing in helping us to be more financially disciplined? The faculty are under the impression that the academic core is absorbing the majority of these cuts. Can you offer evidence that other units are also being asked to run lean operations? There has never been review on Athletic number. The information has never been forthcoming.

Answer: Pres. Standifird: I cannot image why this is not shared. It is tough to get clean data. We have to feel confident on the data and have them as clean as it needs to be. We are way below compared with other universities. Athletic programs are underfunded as everybody else.

CFO Jeff Blade: Every single area has an issue with the budget, in terms of what they are asked to do vs. what was given.

Question: Megan Rimmel: There are 6 faculty members in the involuntary separation program. 4 out of 6 are female. What are we going to say in the next gender equity report?

Answer: Pres. Standifird: We pay attention not to undermine our excellent education. We are thoughtful about keep the coverage we need. The gender equality, the number of 1st generation students, the diversity of student and faculty population are no better than our peers. It is something very much on my radar screen. It is my priority to continue to grow the

organization with inclusive excellent environment. **Provost. Zakahi:** Way back to Spring 2020, college deans are asked to make recommendations about positions. Deans worried the names got out at the very preliminary level. We were not looking names. There is a gender difference. At the end of day, there was a gap.

Question: Megan Rimmel: what would be the steps to eliminate positions?

Answer: Provost. Zakahi: Back to the spring, we were looking at much deeper deficits, and asked the deans for budget reduction plans. We looked at the VSA on faculty. It is seldom strategic. The programs with high demands are heavy hit by the VSA process. Then we looked at programs with lower ranking in terms of program prioritization early in the year, and asked Deans for potential cut, without respect to tenure. All were included. We looked through those for what we could do in nontenured positions. It won't reach the target. Had a few follow-up conversations with Deans. I will not eliminate the positions without conversations with deans.

Question: Naomi Stover : our department (biology) lost the lab coordinator position. It is important to teach and support our labs. We have the highest student credit hours. Was it a part of consideration?

Answer: Provost. Zakahi: I was talking about faculty cut. For the staff cut, there was a different calculation. We make reductions with less impact on faculty positions. It is not necessary following the program prioritization data.

Question: Danielle Glassmeyer: What's the handbook language of eliminating position?

Answer: Provost. Zakahi: I use the termination of non-tenured faculty on page 105 of the handbook (version: Dec 15 2018).

Question: Ahmad Fakheri: The ad hoc committee proposed many long-term and short-term ideas. Is there any serious effort in looking into those recommendations to put the house in a financial order?

Answer: Pres. Standifird: The finance is messy. The estimated financial numbers may not be as much as shown in the white paper. The ad-hoc committee did their best given the data. Take the report and use it as a tool. Jeff (the financial team) and the white paper are pointing to the same direction on some recommendations. Even numbers may not great as half of those suggested. It is still worthy to do that. I am counting on some great work out of these.

Question: Danielle Glassmeyer: I am still confused by the language handbook (page 105) on non-tenured faculty. Which one of three are the governing principle? They are cause, financial exigency, and eliminate of the program.

Answer: Provost. Zakahi: I am not prepared to answer that.

Question: Tim Koeltzow: why so many bad decisions have been made? we are those who face the consequence of those decisions. How would you like the ad hoc committee going forward?

Answer: Pres. Standifird: The finance is messy. We are still learning the process for systematic data. I would like to meet the group again. We have the emergency advisory committee and meet biweekly. If the ad hoc committee wants to talk, let's continue the conversation.

Question: Fred Tayyari: IMET lost 3 faculty through cost control or faculty reduction. There are some courses which can only be taught by two faculty members. Without proper expertise, we will have unhappy customers, which creates more damage. We are not looking for course reduction. Needed faculty expertise must be there.

Answer: Provost. Zakahi: I appreciate your response. Departures are not strategic. The president and I discussed about some requests of additional positions this morning, to make sure we hire positions in the area we need to.

Question: Bill Bailey: will program prioritization continue in next academic year? What's the financial side of AY2019-2020?

Answer: CFO Jeff Blade: We will have the financials around mid-August. **Provost. Zakahi:** We will reform and change the criteria of program prioritization. I cannot give a complete answer.

Question: Mat Timm: In the chat, there are some questions on return to campus. Various senators also suggested on sharing the information what we have, even it is a preliminary plan, and questions on how to handle the situation of student not wearing a mask in the classroom.

Answer: Provost. Zakahi: we will send out an email to faculty and staff. In conversation with deans and chairs, we allow faculty to come back with full teaching and requesting one course online. More information will be in next email of return to work and class function.

If you are approved for on-line, others are face-to-face. If there is issue through HR, teach online. We understand we give students as much face-to-face as possible. Hope face-to-face every day (in theory). Strategic alternating students for courses which exceed covid-19 capacity. Give a stop-clock option for tenure-track faculty. **Pres. Standifird:** there are a series of decisions. we make the best decision as we can , given the data we have. We care about the healthy well-being of faculty, staff and students. We back to campus, following the science. These include mask required, surveillance testing, contact tracing, placing in student housing for quarantine, and be consistent with CDC guideline based on what we know today. We will have whole marketing campaign with what the expectations are and be aggressive to follow the expectations. We will constantly communicate this information.

Appendix List:

- 1. Summary Document – Ad Hoc Report to Senate (July 10 2020) [see attachment 1]**
- 2. Senate Ad- Hoc committee message to the Board of Trustees and Bradley Leadership [see attachment 2]**
- 3. White Paper [see attachment 3]**
- 4. Bradley Student Engagement [see attachment 4]**
- 5. Senate Recommendations [see attachment 5]**

IV. Adjournment (at 5:31 PM)

Submitted by Yufeng Lu, Senate Secretary

Senate Ad Hoc Committee
Report to Senate Executive Committee
July 10, 2020

This Ad Hoc Committee was constituted by Senate Exec with the following charge:

The committee shall formulate specific recommendations to identify practical cost savings, revenue enhancements, and other financial opportunities which will lead to short and long term success consistent with Bradley's core values and academic mission.
(May 2020 University Senate Agenda)

The Committee members are:

- Brad Andersh, Chemistry and Biochemistry
- Aaron Buchko, Management and Leadership
- Jeanie Bukowski, International Studies, Ad Hoc Committee Chair
- Joshua Dickhaus, Sports Communication
- Teresa Drake, Family and Consumer Sciences
- Bernie Goitein, Management and Leadership
- Jackie Hogan, Sociology, Criminology & Social Work
- Tim Koeltzow, Psychology, Ad Hoc Committee Chair
- Yufeng Lu, Electrical and Computer Engineering
- Paul Wayvon, Accounting

The Ad Hoc Committee has been meeting frequently starting on May 5, 2020. The following is a summary of our work thus far. The documents referenced are also included in this communication.

1. ***Message to the Board of Trustees and Bradley leadership from the University Senate Ad hoc Committee.*** This statement was included in the Senate President Report materials for the May 15 Board of Trustees meeting.
2. ***White Paper. Bradley University: Strategies for Overcoming Short-term Challenges and Thriving into the Future.*** The Ad Hoc committee submitted a *draft* strategy document to President Standifird, cc'ing Mat Timm, on June 5. The final version of this *White Paper* was completed on July 9, and is included in this report to the University Senate.
3. **Ad Hoc Committee meeting with President Standifird and CFO Jeff Blade**, June 9, 10 a.m. We discussed most of the items in the draft *White Paper*.
4. **Further communications with President Standifird**, including a University Resources Committee (URC) request for financial information (which will not only honor the University's principles of shared governance, but also allow the Senate to make decisions based on sound data), a call for transparency and clear communication, and a document in support of our recommendation for competing on the basis of quality (***Statement on Bradley's Student Engagement***).
5. **Lydia Moss Bradley Center for Transformational Education.** Pursuant to the White Paper draft and our conversation with President Standifird on June 9, the Ad Hoc

Committee began work on a preliminary concept paper for such a center, based on Bradley's vision as the leader in student engagement. We have coordinated this effort with the New Opportunities committee and the Special Assistant to the President for Strategic Initiatives and Revenue Enhancement. We have confidence that this exciting initiative will come to fruition.

6. **Rethinking Higher Education Pricing Working Group.** In consultation with the Special Assistant to the President for Strategic Initiatives and Revenue Enhancement, the Chair of the ad hoc Committee (Tim Koeltzow) has been asked to populate a working group and develop a charge to explore alternative pricing and delivery models, including summer programming. The Working Group will work collaboratively with key constituents.
7. **Recommendations for Senate action.** We have summarized in a separate document our recommendations that call for direct Senate action.
8. **Response to the announcement on July 8 of the elimination of 12 non-tenured faculty and staff positions.** We understand the challenges presented by the structural deficit and Covid-19. However, given our data-based recommendation that cuts to the instructional core run the risk of hampering Bradley's longer-term success, we are very troubled by these involuntary separations. The potential negative impacts of these cuts are exacerbated by a lack of transparency regarding the basis on which the 12 positions were selected.

Message to the Board of Trustees and Bradley leadership from the University Senate Ad hoc Committee

The University Senate Ad hoc Committee has been convened to “*formulate specific recommendations to identify practical cost savings, revenue enhancements, and other financial opportunities which will lead to short and long term success consistent with Bradley’s core values and academic mission*” (May 2020 University Senate Agenda). We are heartened by President Standifird’s statement that we must be cognizant of “who we are as an institution” as we make the difficult decisions necessary to deal with the significant challenges that we face. We appreciate the creation of the Board of Trustees’ special financial planning committee and the Faculty-Staff Advisory Board as we implement both short- and long-term strategies to surmount the immediate crises and to thrive into the future while maintaining a focus on Bradley’s identity, values, and history.

Bradley faculty look forward to thoroughly and diligently reviewing all areas that can contribute to improving Bradley’s financial position in the immediate term, and also to addressing the long-term financial stability and strength of the University. Indeed, faculty and staff have already contributed to the initial response as we have accepted a pay freeze, the suspension of the salary initiative, benefit cuts, and increased workloads, while maintaining high-quality teaching and supporting our students in the sudden pivot to online. We fully understand the need for change, and we want to ensure that it is the right change, informed and supported by high-quality data and strategic analysis, and aligned with Bradley’s core identity and mission – *as a top-ranked, comprehensive residential university, offering a premium educational experience taught by high-quality faculty*. We do not have the luxury of business as usual, but neither can we afford to make crisis decisions that undercut our ability to succeed.

We are confident that, working together in an environment of trust, transparency, clear communication, cooperation and good will, the Board of Trustees, the administration, faculty, and staff will successfully steer our University through this period of adversity. We are held together by the culture of dignity, respect, and determination that makes us **Bradley**. The faculty are prepared to work alongside the administration, and we look forward to strengthening our relations with the Board. We offer our expertise, our service, our labor through the summer, and our commitment to living up to the strength and values of our founder, Lydia Moss Bradley. Specifically, this University Senate Ad Hoc Committee stands ready to provide quickly the analysis and recommendations specified in our charge, anticipating access to the data and information necessary to make that possible.

WHITE PAPER
**BRADLEY UNIVERSITY: STRATEGIES FOR OVERCOMING SHORT-TERM
CHALLENGES AND THRIVING INTO THE FUTURE**
July 10, 2020

Charge of the Senate Ad Hoc Committee:

The committee shall formulate specific recommendations to identify practical cost savings, revenue enhancements, and other financial opportunities which will lead to short- and long-term success consistent with Bradley's core values and academic mission.

The intent of this report is to identify short-term measures to navigate our current challenges that ensure the long-term strategic success of Bradley University.

To weather the current challenges and thrive in a rapidly changing marketplace, Bradley must recognize, draw on, build, and effectively market the core strengths that differentiate us from competitor institutions. We therefore must ask hard questions about past strategic decisions, pivot toward a clearly-defined vision, assert ourselves in the marketplace, ***and base short- and longer-term decisions on this vision.*** This White Paper engages some of those hard questions directly and offers preliminary recommendations for charting our way forward in a renewed environment of trust, transparency, and communication. Faculty want to work productively to identify short-term solutions and nurture the long-term future of Bradley.

This initial analysis indicates the following:

- Bradley's unsustainable financial position has multiple causes that must be understood in order to be overcome successfully.
- Bradley must implement a contemporary, transparent budget process that sets benchmarks and drives accountability.
- Bradley has a clearly-defined core identity that has value in the marketplace, yet decision-making has frequently been misaligned with this identity and vision.
- Bradley must establish a price point commensurate with its identity.

1. A Hard Look at our Financial Situation: How Did We Get Here?

We begin our analysis of Bradley's situation via a comparison with Butler University (Table 1, below). This comparison was developed by the University Resources Committee, based on the consideration of Butler as a benchmark of success. This analysis was completed prior to the appointment of our current President.

TABLE 1: FINANCIAL STRUCTURE ANALYSIS AND COMPARISON WITH BUTLER UNIVERSITY

	Bradley	Butler	Diff	
Enrollment	4,606	4,698	(92)	→ Similar size
Tuition	\$168,451	\$203,577	\$35,126	→ Butler generates "premium" gross tuition
Allowances	(\$66,636)	(\$77,971)	(\$11,335)	→ Butler gives higher Allowances
Net tuition	\$101,815	\$125,606	\$23,791	→ Butler generates "premium" net tuition
-- Allowance %	-39.6%	-38.3%	-32.3%	
Contributions	\$950	\$4,388	\$3,438	→ Bradley Contributions are only 22% of Butler
Net residence and AUX	\$0	\$28,213	\$25,939	
Athletics	\$0	(\$17,163)	(\$17,163)	→ Butler clearly discloses Athletics spending
Net AUX	\$2,274	\$11,050	\$8,776	→ Bradley combines all AUX items; Butler much higher
Other revenue	\$24,402	\$26,012	\$1,610	
TOTAL REVENUE	\$129,441	\$167,056	\$37,615	→ In total, Butler generates \$38m more
Instruction	(\$57,933)	(\$65,247)	(\$7,314)	→ Bradley's Instruction spend is \$7m lower
Academic and student support	(\$9,660)	(\$20,780)	(\$11,120)	→ Bradley's academic and student support is \$11m lower
Admin and general	(\$47,872)	(\$44,202)	\$3,670	→ Bradley's Admin and General is higher
TOTAL EXPENSES	(\$115,465)	(\$130,229)	(\$14,764)	
Earnings before interest and depreciation	\$13,976	\$36,827	\$22,851	→ Butler has much greater Earnings before interest and depreciation
Interest	(\$4,219)	(\$4,892)	(\$673)	
Earnings before depreciation	\$9,757	\$31,935	\$22,178	
Depreciation	(\$13,431)	(\$19,210)	(\$5,779)	
Operating income	(\$3,674)	\$12,725	\$16,399	→ Butler has much greater Operating Income
Average tuition	\$36,572	\$43,333	\$6,761	→ Butler's gross tuition: 18% premium
Average allowance	(\$14,467)	(\$16,597)	(\$2,129)	→ Enables 15% more in allowances
Average net tuition	\$22,105	\$26,736	\$4,631	→ Butler generates 21% more in net tuition

Notable in this comparison, Butler is generating more tuition revenue from a similar number of students as well as more revenue from auxiliary areas and donations. They spend noticeably more on instruction and academic and student support services and less on administrative costs and have a very favorable overall operating income. Moreover, Bradley has run negative “earnings before depreciation less capital expenditures” for most of the past 15 years, and has spent \$400 million in capital expenditures during that same period, causing debt to rise to over \$150 million.

Our initial analysis of Bradley’s financial situation is as follows.

While COVID-19 must now be considered in Bradley's plan for recovery, the University's current financial problems are not due to the pandemic. The analysis of Bradley's public audited financial statements from 2015 through 2019 reveals that during the past 5 years, Bradley University has recorded operating income (losses) of:

2015: \$917,000
2016: $-\$(2,680,000)$
2017: $-\$(189,000)$
2018: $-\$(3,071,000)$
2019: $-\$(3,674,000)$

This represents a net operating loss of nearly \$9 million (\$8,697,000), and there is every indication that the operating loss in 2020 will be over \$8 million, before considering the impact of the COVID-19 situation on the University. For the period 2015 – 2019, Bradley has sustained operating losses averaging \$1,739,000 per year; and the rate of decline has accelerated. As a comparison, for the 10 prior years (2005 – 2014), Bradley generated \$70,676,000 in operating income, an average of just over \$7 million per year. This represents an average net margin swing of \$8,806,000. After 2020, the average losses will increase.

A significant impediment to sound institutional decision-making over the last two decades leading to our current predicament has been the lack of a clear financial budgeting system. Efficiency, innovation and strategic planning in units across the university have been seriously hampered by the lack of access to detailed financial information. Greater financial transparency would not only facilitate sound data-driven decision-making, but would also help build a climate of trust. And this climate of transparency and trust is crucial to the success of what we anticipate will be significant changes over the next few years.

RECOMMENDATIONS:

- Bradley must establish accountability benchmarks across all units in the University.
- A Responsibility-Centered Management (RCM) system must be implemented. The Foster College of Business has developed and implemented its own budgeting and accounting system that has allowed it to find efficiencies and enhance revenues. Appendix 1 provides summary information on this system, and we look forward to discussing it further.

2. The Basis for Bradley's Excellence

As we reform our accounting and budgeting systems, we must also draw on our core strengths and vision to guide short- and long-term decisions.

Bradley's stated vision is to be the leader in student engagement. This vision echoes Lydia Moss Bradley's emphasis on cultivating practical skills and purposeful lives, extends Bradley's 2000 Higher Learning Commission Special Emphasis on mentored research, and is central to the 2020 HLC Quality Initiative on Experiential Learning. In a stressed and crowded marketplace where competitors offer credentials built on cheaper delivery models (transactional education), Bradley's niche is to relentlessly deliver a **transformational learning experience**. Thus, courses and co-curricular activities are imbued with High Impact Practices (Writing Intensive courses, mentored scholarship, study abroad, student organization leadership development, internships that engage community partnerships, etc.). Simply stated, Bradley students are personally and

professionally transformed by routinely confronting authentic problems with devoted mentors; they learn to marry their passions with a portfolio of useful skills that are in high demand by employers.

The stakes for meaningfully aligning strategy and resource allocation to our core identity are high. Even before the current pandemic and the looming “demographic cliff,” pressures at scales from the global to the local have been changing the demand for and the delivery of a university education. As an article in *Forbes* argued in 2013, for example, in the face of competition from online delivery in an interconnected world, elite universities and community colleges that “deliver bankable skills” will likely survive, but “It’s going to wipe out high-cost **mediocre** private schools without big endowments.”

In our view, every decision that does not expressly and obviously foster transformational learning for our students draws us irretrievably closer to mediocrity. By contrast, when resource allocation is inherently linked to advancing student engagement, Bradley’s unique commitment to student transformation shines. In tandem with our core values as a community devoted to academic excellence, diversity and inclusion, continuous improvement, and the cultivation of lives of purpose, Bradley’s Vision articulates a 21st century education that is both wholly congruent with Lydia’s founding imperative and operates to secure a vibrant Bradley future.

RECOMMENDATIONS:

We acknowledge that the current Bradley University Strategic Plan (BUSPC) is largely tactical rather than strategic, and is hopelessly ambitious in its attempts to compensate for previous plans that simply seem to have sat on a shelf. The current plan represents progress towards achieving broad participation among stakeholders and a more meaningful embrace of Bradley’s core identity (and the lessons from this process should be preserved). Nevertheless, given the vital importance of preserving Bradley’s core vision as we navigate current challenges, we recommend the following.

- Immediately convene members of the Bradley University Strategic Planning Committee (BUSPC) to summarize progress and outcomes of the current plan; identify tactics that are near completion or remain vital to Bradley’s immediate success; and reconsider the Plan’s recommendations in light of new challenges.
- Convene the BUSPC to initiate a new strategic plan (2021-2025) that is:
 - Responsive to current and anticipated challenges;
 - Explicitly linked to viable Development initiatives;
 - Broadly accepted by Bradley stakeholders;
 - Clear in stipulating accountable personnel in the delivery of tactical benchmarks;
 - Designed to advance Bradley’s position as a leader in engaged learning;
 - Calibrated to differentiate Bradley from our competitors in a crowded higher education marketplace.
- Foster enhanced engagement between the Senate Executive Committee, members of the higher Administration, and the Board of Trustees. We are all allies in our efforts to revitalize the University. In particular, information used to make difficult decisions should be broadly shared whenever possible, to create a climate of trust, transparency and accountability.

3. The Instructional Core and High-Quality Student Engagement

While we recognize that University cost-cutting is necessary to address current financial challenges, it is clear from our analysis that short-term cuts in instructional costs come with strategic risks. The most notable of these is a decline in the quality of service delivery. If class sizes increase, student engagement activities decrease, and we shift more courses online (except in cases of public health necessity), we are in danger of looking increasingly like community colleges, public universities and online universities, with whom we cannot compete on price. If we lose the ability to provide a transformational learning experience, we lose our market distinctiveness. While there is a significant segment of the market that is willing to accept certain limitations in exchange for a lower price, there is a substantial segment of the market that desires academic quality and the learning experience and will pay a premium price for these services. This segment must be the focus for Bradley University.

If Bradley is to be effective in competing on differentiation based on a transformational learning experience, it is then essential that our decisions protect the core of that experience, while at the same time maximizing efficiencies in activities that are non-core. We recognize that there are substantial administrative requirements and auxiliary services that must be provided for a University to carry out its purpose. It is axiomatic in strategy, though, that an organization focuses on the primary activities in the value chain in order to have a strong position in the market. Bradley should seek to reduce non-core secondary support activities in addition to encouraging maximum efficiency in classroom instruction in order to have a strong competitive position.

Data from Bradley’s Human Resources department indicates that the total regular employment of the University is currently allocated as follows (as of May 22, 2020):

Non-Exempt (Hourly/Non-Union)	130
Union (Hourly)	131
Exempt (Salary - Non-Faculty)	332
Faculty	356
Total Full Time Employees	949
PT Hourly	14
PT Faculty	231
Temporary PT Hourly	5
Temporary PT Exempt (Non-Faculty)	38
Temporary PT Faculty	81
Total Part Time Employees	393
Total Employees	1,342

As a tuition-driven institution, the primary service that Bradley “gets paid for” is providing high quality classroom instruction leading to the awarding of a degree in the students’ chosen fields, enabling them to have a positive career and lead “useful and productive lives,” to quote the University’s founder. In financial terms, classroom instruction is the “profit center” for Bradley University, indeed for virtually all universities. Yet, in the short-term, a key focus of the immediate-term discussions has been on improving the faculty operating margins by increasing teaching loads and reducing compensation and benefits. While cost containment and efficiency

measures are appropriate and ought to be implemented, since education is a service industry in which people are the means of delivery, there is a point at which reducing services diminishes the quality of classroom instruction – for which students pay their tuition. This can create a vicious cycle: As revenues diminish, fewer faculty are hired and retained, which can increase class size, which can decrease freshman-sophomore retention, which can decrease revenues. With the elimination of part-time faculty for the 2020-21 academic year, Bradley’s IPEDs data will reflect a 15:1 student-to-faculty ratio. By contrast, all of the top ten schools in the *US News and World Reports* rankings of Midwest regional institutions have a ratio of 12:1 or lower.

In light of the data it seems reasonable to ask if there are other forms of cost reduction that might be more appropriate in operations, administration, etc., that would allow preservation of faculty positions and the quality of classroom education. *For Bradley University, roughly 300 faculty (discounting those engaged in administrative duties) and 312 part-time faculty are generating the tuition revenue that supports the remaining 730 positions in the University.* And as noted in the Financial Structure Analysis and Comparison to Butler contained in Table 1, instruction costs do not appear to contribute to Bradley’s “structural deficit”.

Taking care not to undermine high-quality classroom instruction is particularly important in Bradley’s case, given that one of the characteristics that distinguishes Bradley in the higher education marketplace is a demonstrated commitment to **student engagement** (small class size, individualized learning opportunities, faculty-student collaboration, and real-world learning opportunities, among others).

RECOMMENDATIONS:

Based on the limited financial data to which we had access, we carried out a preliminary analysis, and our recommendations are outlined in Appendix 2. We have identified anticipated savings from a variety of cuts to the instructional core that have already been made for AY2020-21 (approximately \$8 million). We have identified additional cost-saving measures for the shorter-term (approximately \$11 million). And we have presented some preliminary ideas for longer-term strategic initiatives in line with our vision (with the potential for an estimated \$11 million in new revenues).

4. Competing on the Basis of Quality, Not “Affordability”

We have concerns about the meaning of “accessible excellence” (also recently stated as “accessible but excellent” or “accessible and excellent”). This is not a term that appears anywhere in Bradley’s strategic plan, nor is it referenced in Bradley’s mission or vision statements. Rather, it is a term that seems to have emerged in recent months in certain parts of the University, without input from many of the stakeholders who would be charged with delivering on this idea.

A review of the literature on this subject indicates that “accessible” is often conflated with or is a euphemism for “affordability.” And “affordable” in the higher education industry means price, more specifically the price of tuition. It is difficult to see how Bradley can be competitive in the higher education industry based on price. Our cost structure, like that of most universities, is heavily weighted toward labor and capital. Unlike many competitors, Bradley does not have the size to be able to utilize economies of scale to drive down unit costs and increase margins. Nor does Bradley have access to the kinds of government monies from the state that subsidize public

universities. Nor does Bradley have the ability to secure major grants from Federal agencies when competing against larger institutions. Nor does Bradley have the large endowments of older nationally-known schools such as Harvard, Princeton, Yale, the University of Texas, or Stanford. Nor does Bradley have access to funding support from religious entities, such as Brigham Young, Marquette, St. Louis University, and others. As Bradley has often stated, we are a private, tuition-driven, secular, comprehensive University.

Consider the situation in Bradley's market area. The following table was produced from data received from Bradley's Office of Enrollment Management.

	School 2019-2020 Tuition & Fees	Tuition difference to Bradley	Room & Board	Room & Board difference to Bradley	Total	Total difference to Bradley
Loyola – Chicago	\$45,488	\$10,878	\$14,580	\$3,960	\$60,068	\$14,838
St. Louis Univ.	\$45,464	\$10,854	\$12,090	\$1,470	\$57,554	\$12,324
Marquette	\$43,930	\$9,320	\$12,730	\$2,110	\$56,660	\$11,430
Augustana	\$43,610	\$9,000	\$10,890	\$270	\$54,500	\$9,270
Average Private Compared	\$42,072	\$7,462	\$12,049	\$1,429	\$54,121	\$8,891
Valparaiso	\$40,520	\$5,910	\$12,260	\$1,640	\$52,780	\$7,550
DePaul	\$40,880	\$6,270	\$11,175	\$555	\$52,055	\$6,825
Bradley University	\$34,610	\$0	\$10,620	\$0	\$45,230	\$0
Average All Private Non-profit, 4 year	\$32,410	(\$2,200)	\$11,337	\$717	\$43,747	(\$1,483)
Univ. of Iowa IL Resident	\$31,458	(\$3,152)	\$11,400	\$780	\$42,858	(\$2,372)
Purdue - Lafayette IL Resident EGT	\$30,844	(\$3,766)	\$10,030	(\$590)	\$40,874	(\$4,356)
Purdue - Lafayette IL Resident	\$28,794	(\$5,816)	\$10,030	(\$590)	\$38,824	(\$6,406)
Univ. of Illinois - Urbana EGT of BUS	\$17,040	(\$17,570)	\$11,480	\$860	\$28,520	(\$16,710)
Univ. of Illinois - Chicago	\$15,238	(\$19,372)	\$13,038	\$2,418	\$28,276	(\$16,954)
Univ. of Illinois - Urbana	\$16,210	(\$18,400)	\$11,480	\$860	\$27,690	(\$17,540)
Northern Illinois EGT	\$13,524	(\$21,086)	\$10,880	\$260	\$24,404	(\$20,826)
Illinois State	\$14,516	(\$20,094)	\$9,850	(\$770)	\$24,366	(\$20,864)
Northern Illinois	\$12,324	(\$22,286)	\$10,880	\$260	\$23,204	(\$22,026)
Southern Illinois Edwardsville	\$12,219	(\$22,391)	\$9,843	(\$777)	\$22,062	(\$23,168)
Western Illinois	\$11,866	(\$22,744)	\$10,100	(\$520)	\$21,966	(\$23,264)

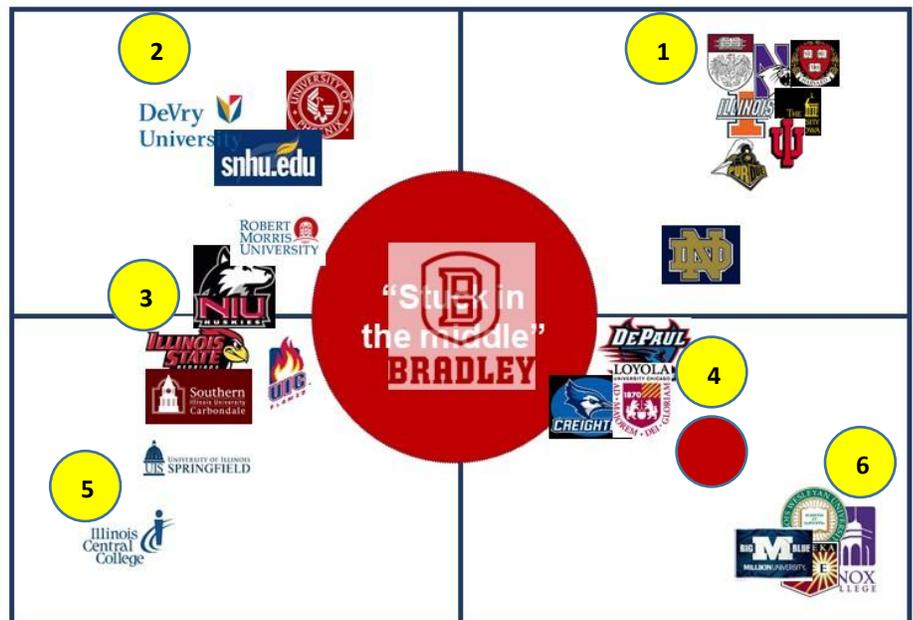
As the table clearly shows, Bradley is not capable of competing based on price. The nearest public university competitor based on price is the U of I in Urbana-Champaign, where Engineering and Business majors pay a premium price of \$17,040—a price less than half of Bradley's tuition. When it comes to Western Illinois, Bradley is three times as expensive, and our tuition is more than double that of the U of I – Chicago. For that matter, Bradley's base tuition is more expensive than the out-of-state tuition of the major Big Ten schools in the table (the University of Iowa and Purdue). The one mitigating factor is that we average nearly a 40% discount, so actual tuition is roughly \$21,000 per student. But even considering our discounted tuition, we are still higher than every one of the state schools listed on the table, and that presumes that the state schools do not offer any financial aid or scholarships to offset the cost for students.

Consider also those looking for an affordable education in the immediate Peoria (central Illinois) area. Illinois Central College has increased tuition by \$5 for the fall semester, bringing ICC up to \$155 per credit hour. In contrast, Bradley's stated tuition is \$890 per credit hour. Bradley is over five times as expensive as ICC; and, because of the Illinois agreement, we will accept ICC courses as transfer credits for Bradley courses. Thus a central Illinois student could pay \$465 to take Macroeconomics at ICC, or \$2,670 for the identical course – insofar as transfer students, the Registrar's Office, and the student's transcripts are concerned. Why would a student with issues

of financial affordability and accessibility to college pay almost six times as much for the same course?

If accessible means affordable, then Bradley – despite our efforts at recruiting and offering of tuition discounts over the past five years – has not been successful in moving into a position of being able to compete with other institutions based primarily on tuition price. Indeed, given the relative cost structures and the government subsidies available to state institutions, it is unrealistic to suggest that Bradley can compete on the basis of price. Furthermore, the reality is that if we charge less for our “product,” we need to sell more of it. In other words, we will need to enroll more lower-paying students (rather than fewer students who each pay more). Consequently, unless we hire more faculty and staff to serve those students, we risk undermining our marketplace distinction—our reputation for small classes and student engagement. In analyzing the competitive situation in which Bradley operates, we used Dr. Michael Porter’s classic model of Generic Strategies to assess the higher education industry. Our final model pursuant to this analysis appears in the following figure.

Scope of Market Coverage:



Source of Competitive Advantage:



We determined that Bradley is, in Porter’s words, “stuck in the middle,” lacking a unique market position. Bradley draws from a regional base like the smaller state schools and the regional private universities, but does not have a cost structure that allows it to compete with the state schools on price; nor has the University identified, fortified, and communicated the basis for the University’s differentiation. In effect, Bradley is in danger of “trying to be all things to all segments” and serving none of these segments well. And, as Dr. Porter notes (and nearly 40

years of research attests), organizations that are “stuck in the middle” tend to be the low performing firms in any industry.

Based on this analysis, we believe that Bradley must seek to position as the “Red Dot” in the lower right-hand quadrant of the strategic map. Bradley needs to adopt a focused strategy, concentrating on the segment of the market that values transformational learning through high student engagement practices in a comprehensive university. This segment will pay a premium to have the transformational learning experience that not only provides a degree but that prepares the students to lead “useful and productive” lives. *The University’s differentiation must be on the basis of an interactive learning experience across five high-quality colleges that engages the student as active learners (as opposed to the passive models used by many of the low cost institutions) with highly qualified faculty who are dynamically engaged in their professional field of study and are able to incorporate their scholarship and professional practice into their teaching.* We suggest therefore, that a brand of “accessible excellence” may undermine our market position. A shift of emphasis to “inclusive excellence,” however, would be consistent with our institutional values and goals, and is therefore well worth considering.

RECOMMENDATIONS:

- Build a market strategy that differentiates Bradley as a high-quality comprehensive university, building on our core strengths such as student engagement and providing a transformational learning experience.
- Work toward achieving a price point commensurate with our identity and quality.
- Evaluate alternative models that consider differential tuition, for example in conjunction with increasing summer enrollment and providing a three-year completion path.
- Maintain our commitment to a 12:1 student to faculty ratio, and consider a strategic initiative to lower that ratio further over time in order to compete with the most highly-regarded institutions in the region.

5. Administration Responses and Actions

- The President and CFO expressed support for increasing financial transparency and willingness to have a conversation about how best to do this once the immediate challenges have been addressed. The Ad Hoc and University Resources Committees look forward to engaging in this conversation, and anticipate that the URC’s request for specific financial information will be provided as soon as possible.
- The President expressed his understanding of the importance of clarity, transparency and honesty in communication. We understand the urgency of the current situation, but recommend that even in these circumstances, strenuous efforts will be made to rebuild a climate of trust on campus.
- The President carefully considered and openly discussed with us the main points of the draft *White Paper*. He was particularly supportive of an initiative that would create a Lydia Moss Bradley Center for Transformative Education, and indicated interest in proposals such as evaluating tuition models and summer enrollment opportunities. We understand that campus expertise will be utilized, and we recommend more such efforts to consider cost savings and revenue generation ideas consistent with our core mission.
- The President was receptive to a strategy of “inclusive” as opposed to “accessible” excellence, which we believe is much more closely aligned with Bradley’s core strengths

and will enable us to further strengthen our commitment to diversity, inclusion, and equity. We recommend that such a strategy be developed and supported in the context of our five colleges' high-quality delivery of a transformative undergraduate education, and with significant input from faculty.

- From our limited understanding of the decision-making process, we appreciate that the number of positions eliminated (announced on July 8) could have been much greater. However, we reiterate our strong caution that cuts to the instructional core undermine Bradley's ability to succeed. We look forward to gaining a greater understanding of the administration's view regarding the appropriate balance between instructional and other costs of the University.

- **APPENDIX 1: Foster College of Business – Contribution Margin Statements and Decision-Making**

In 2014, the Foster College of Business developed and implemented a budgeting process and Responsibility-Centered Management reporting system which included the development of Contribution Margin Statements. Over the past six years, there have been continuous improvements made to the process and the financial reports, in conjunction with non-financial metrics, have been used to make data-driven decisions and reallocate resources within the college.

Responsibility-Centered Management Process

In any organization, it is important for long-term financial stability to understand both the revenues and the expenses associated with each product or service. It is also important to have the appropriate revenues and expenses assigned to its related product or service. This gives leadership a clear view into the resources and productivity of each unit and the organization as a whole. With limited resources and increasing constraints on them, it is ever-more important to understand where resources are being directed; ideally, toward strategic initiatives that move the organization forward and are mission-aligned.

The leadership of the Foster College saw a need to establish this system to have a true understanding of its financial picture, to determine which programs and units needed attention, and where it could redirect resources toward strategic initiatives. In a collaborative effort, the college dean and members of the University Resource Committee worked with staff in IT to develop a report on tuition revenue. This report (found in rePortal), along with information accessed from Financial Edge, the class schedule, AcInquire, printed Endowment Spending Reports, Continuing Education (for interim salary information), Part-time Faculty contracts/file and Courseload Bank (a file created with information regarding course releases and course load for each individual faculty member). This is a cumbersome process given there is no Enterprise Management System (EMS) on campus to pull all the information from, yet it is worth the time (and has been streamlined within the college over time to make it more efficient) to obtain the information needed to make valid decisions.

This process recognizes each dollar of revenue that comes in to the college and each dollar of expense that goes out of the college; with a disclaimer that the amounts are those that the college has access to. Without going into too much detail, the transactions are allocated to their appropriate program or unit, and aggregated into a Contribution Margin Statement. This shows the college the dollar amount each unit is contributing back to the university; some at a surplus, some at a deficit. Regardless of surplus or deficit, the contribution is reviewed because even if a unit is contributing a positive dollar amount, it could likely be contributing at a higher positive amount if resources are shifted and used more efficiently. On the other hand, a unit that is contributing at a loss is reviewed to see if resources should be shifted elsewhere, if additional resources should be directed toward the unit to correct issues, and to determine if the college is supportive of the unit operating at a loss if it is mission-critical and if another unit is able to offset the deficit with a surplus of its own. The offerings should be looked at as a portfolio and analyzed accordingly to make the most appropriate decisions for the college and overall, the university.

Another benefit has been building out financials for the college for a 10-year period, to view trends and identify areas for growth, consistency, or decline. The Foster College shares this information with department chairs and the college overall, for transparency into financial position and decision-making. It is also reviewed frequently with the college's National Council of Advisors for discussion on process, position, and strategic initiatives. It allows us to identify in which areas to increase support and which areas to right-size.

Examples of Changes from Data-driven Decisions

- 1) The Foster College offers a high-quality, nationally-ranked MBA program. When the college's first Contribution Margin Statements (CMS) were created and reviewed, the MBA program drew attention as it was operating at a deficit. Most MBA programs at peer institutions operate at a surplus, (at least at the time of the analysis). To determine what was causing the deficit, the data was reviewed and discussed with the Academic Director of the MBA. Historically, there were several concentrations that were offered, each requiring its own set of electives. However, there were fewer students enrolling in these concentrations and thus, the class sizes were decreasing (along with revenue) yet the expenses were remaining the same. Also, there were many courses being offered each semester to two to four students, taught by senior faculty with higher salaries. By working with the Academic Director and Associate Dean, an efficient and effective course sequencing was created and implemented over the next two academic years. The necessary courses were offered at the same high quality delivery as before, but at a more efficient scale.
 - a. The number of courses offered over an academic year (including interims) went from 50 to 37 while maintaining small class-sizes (only increasing from an average of 10 students per class to 12). The integrity of the program was maintained yet at a much more efficient level. While revenues remained consistent, the expenses decreased by 17% and the deficit decreased by 50% over a two-year period. By the third year, the deficit had been reduced by 83%. The faculty resources were able to be reallocated to other programs and strategic initiatives within the college. Taking a loss at an acceptable level on this program (ensuring it is offset by a surplus in other programs) allows the college to maintain its MBA program which enhances its portfolio for status, competitiveness, and the recruitment of high-quality faculty and staff.
- 2) The Foster College encourages innovation in new offerings; thus, the Masters of Science in Quantitative Finance was implemented Spring 2009. The first course was offered in May 2010 and the first degree awarded was in Spring 2011. When the CMS was completed in 2014, it was evident that this program needed to be reviewed as it was in a substantial deficit. Also, one of the college's initiatives in its strategic plan at the time was, "Review investments in specialized graduate programs". The leadership in the college reviewed the number of courses offered (7), number of total students taking those courses (11), with an average class size of 1.5, the total number of students enrolled in the program in its 5-year existence (25 of which 10 switched to

another major), number of graduates (8), and number enrolled (7). There were senior faculty teaching courses to 1 to 2 students as credit toward a full course load for a program that didn't seem to be gaining traction. Using both the financial data and the non-financial data, the recommendation was brought to the college to sunset the MSQF program. The program graduated its final student in 2016. The faculty resources were reallocated to enhance the undergraduate Finance program, also aligned with the college's strategic plan.

- 3) The Foster College uses enrollment data, graduation rates, and successful outcomes in conjunction with financial data to make decisions. For example, the Accounting Department has shown a consistent number of majors in the undergraduate, 3/2, and MSA programs over the past several years. Additionally, the department is incredibly engaged with its students on an individual basis as well as in two active organizations: Beta Alpha Psi and The Accounting Club. Through these organizations, the faculty and the students collaborate on offering informational sessions and events, including the VITA Program where students and faculty volunteer service hours every spring assisting individuals in filing their tax returns, saving them accountancy fees. Also, the department has a Tokyo Accounting College in Japan which prepares students to sit for the US CPA Exam. The outstanding outcomes of the CPA pass rate of its graduates has gained national recognition and continues year-over-year. Finally, the Accounting Department has worked tirelessly on developing an online graduate program.
 - a. Given the consideration of both financial and non-financial data, the growth of programs, and the continued successful outcomes, the college supported the department's request to grow their number of faculty members by 1 in the 20-21 school year. Since FY14 (date as to when the data above began being tracked), the department consistently had 9 faculty members. By shifting resources, the department was able to invest in and hire a tenth faculty member to aid in supporting their strategic initiatives.
- 4) Overall Expenses and Administrative Costs: Using the Contribution Margin Statements and the budgeting process together, the Foster College has aligned the funding for expenses with strategic initiatives. While the expenses have remained relatively consistent across the past 9 years, they have been directed toward areas of importance of which can move the college forward.

The examples above were selected to show the process can be used in many ways and in conjunction with a variety of non-financial data to arrive at a desirable solution. This system can be implemented across any organization for revenue centers and cost centers alike. By collecting and reporting the financial data in a consistent way, it allows the organization to identify areas of improvement and investment and allocate resources toward strategic initiatives.

Appendix 2: Cost-Cutting and Revenue Generating Measures

We understand that tough decisions need to be made to improve our financial situation; however, it is imperative that all short-term measures employed to realize savings do not undermine our quality and longer-term market competitiveness. We are concerned that many of the measures that have been implemented will negatively impact our ability to retain both students and employees as well as deliver the “Bradley Experience” that we have marketed.

We have attempted to estimate the savings that may be realized based upon these measures; however, **due to the lack of access to accurate financial information, we realize that our estimates may need significant adjustments.**

Table 1: Cost saving measures already implemented	Estimated Savings
<i>Short-term savings that we assume will be reversed in FY22</i>	
Release of adjunct faculty for FY21 and move full-time faculty to larger	\$1,250,000
Suspension of raises for FY21 (2% x payroll)	\$308,000
Elimination of Professional Travel (estimation based on one trip per year)	\$350,000
Elimination of professional fee reimbursements (200 x \$500)	\$100,000
Deferral of laptop renewals	\$100,000
Suspension of sabbatical leave program	\$400,000
Suspension of funding for Intellectual and Cultural Activities	\$40,000
Suspension of funding for internal grant programs	\$100,000
<i>Longer-term savings</i>	
Voluntary Separation Program (VSP)	\$2,400,000
Changes to Healthcare plan	\$650,000
Changes to Short-term disability	\$100,000
Retirements & resignations prior to VSP not filled or deferred (Estimate: 10	\$1,250,000
Other hiring freeze savings prior to VSP	\$500,000
Estimated Total for Initiatives Already Implemented	<u>\$7,548,000</u>

Additional Cost Cutting Measures

The committee has discussed numerous additional cost-cutting measures to explore (Table 2). The ability to generate accurate estimates of cost savings requires improved access to the relevant financial data. We also understand that it may not be possible to implement some of these changes in FY 21.

Table 2: Additional Cost Saving Measures	Estimated Savings
1) Make additional changes to post-retirement medical benefits - \$47M long-term ++	
2) Offer a more attractive retirement option – Example: phased retirement	
3) Offer tenured faculty an alternative work model - Lower salary in exchange for greater work/life flexibility ++	
4) Make another push to reduce the number of 12-month contracts on campus	
5) Devolve administration of graduate programs ++	
6) Find alternative strategies to manage debt - reduce risk exposure	
7) Reduce portfolio investment fees - 50% reduction to budget	
8) Reduce outside legal fees given that we have internal counsel - 50% reduction to budget	
9) Re-examine library services/staffing for short-term cost-savings	
10) Utilize internal expertise to evaluate processes rather than hire consultants	
11) Careful cost-benefit analysis of all "centers" on campus, particularly those that are not self-funding	
12) Reduce redundancy between campus units (ex. marketing, admissions, advising, etc.) ++	
13) Return leased and "in-kind" vehicles	
14) Evaluate staffing in Athletics – (81 positions in Athletics)	
15) Reduce administrative costs - See comparison to Butler on p. 2	
16) Merge the alumni relations and development offices	
17) Revisit contracts with “top” vendors	
18) Evaluate rental of off-campus facilities (ex. Peoria NEXT)	
19) Evaluate the role and mission of Continuing Education	
20) Evaluate staffing and resourcing of the Bradley Police Department and strengthen ties with the Peoria Police Department and relevant neighborhood associations to improve community policing efforts	

21) Examine the portfolio of Athletics programs	
Potential Additional Savings	<u>\$5-10 million</u>

++ denotes additional explanation below

Table 2.1: POST-RETIREMENT MEDICAL BENEFITS (PRMB)

Back in 1990, the Financial Accounting Standard Board issued FAS106 that required a change in accounting method for Post-Retirement Medical Benefits. Generally, it moved from a “pay as you go” expense basis to a method similar to defined benefit pension plans. This was effective for fiscal years starting after December 15, 1992.

The reason for this change was to more clearly show the enormous, and growing liability for PRMB plans. FAS 106 required that this obligation should be fully disclosed as a long-term liability on an enterprise's balance sheet. This more accurately showed both the current and future cost of medical plans, including the significantly rising future medical costs.

To address this, **most companies, small and large, made immediate changes to their post-retirement medical plans.** Such actions ranged from: elimination of plans, phase-out of obligations, or redesigns of plans to limit or lower future costs.

In 2017, Bradley offered a “buy-out” of its PRMB to its employees. Employees could either keep their PRMB plans, or opt for a 2% additional contribution to their TIAA account. We are unaware of the success of this buy-out option, but based on the following information, it does not appear that the option was taken by many employees, leaving Bradley highly exposed to its PRMB obligations.

As of May 31, 2019, Bradley's PRMB liability was \$47,001,000, compared to \$39,547,000 on May 31, 2016 (the year before the buy-out option), which represented a \$7,454,000 liability increase (a 19% increase), and the “Benefits Paid” in 2019 were \$2,888,000 compared to \$1,575,000 in 2016, which represented an 83% increase.

On May 31, 2005, Bradley's PRMB obligation was “just” \$19,806,000, meaning that Bradley's PRMB obligation has more than doubled since 2005. By further comparison, Butler reported no PRMB obligations in their 2019 financial statements.

It is important to stress that most enterprises have managed this financial obligation down significantly, or eliminated it entirely, whereas Bradley's PRMB liability has more than doubled. The URC has brought this matter to the attention of management for a number of years as it represents both a significant short-term (Benefits Paid) and long-term avoidable resource drain on Bradley.

The Senate Ad Hoc Committee strongly suggests that this area be investigated for a significant short-term and long-term area for savings. However, we are not proposing that benefits for existing employees be involuntarily cut. Moreover, any decrease in this liability must also be considered in the context of salary initiatives, so that Bradley’s total salary and benefit packages not continue to fall behind peer and competitor institutions.

Table 2.5: Devolve administration of graduate programs

***Note: Corrections were made to this section in response to concerns raised at the University Senate meeting on 7/16/20 by Dean Bakken.*

At Bradley, the Graduate School oversees the Office of Sponsored Programs (OSP) and the Office of International Student and Scholar Services (OISSS), but does not have its own faculty or deliver its own courses. This is a fairly unusual structure, and there have been questions about whether this structure is ideal at Bradley. One possibility is to move OSP and/or OISSS (see section specific to this office below) to a direct report to the Office of the Provost and to transfer many of the day-to-day functions of the Graduate School to other offices on campus. The ad-hoc senate committee received memos that were shared with previous administrators and has attempted to summarize the key suggestions below. The primary reasons provided for this change were to better define ownership and responsibility of graduate programs, to improve strategic planning, and to provide incentives for units to grow and develop new graduate programs.

What follows are suggestions for the transfer of duties that may foster enhanced efficiencies. Whether the units suggested below have the capacity to deliver on these responsibilities with existing resources is a question that must also be addressed.

Recruitment and Marketing

- *Development and distribution of marketing materials*
- *Coordination of domestic, international and online recruitment*
 - These duties could be assumed by the Marketing and Admissions offices.

Admissions Process

The basic process for admitting a graduate student to a program is:

1. Receive the application and the supporting material (for example: application, transcripts, and letters of recommendation)
2. Evaluate credentials, including calculation of a GPA
3. Submit the material to the department for admission recommendation
4. Make admission decision, including conditions, contingencies, prerequisites, and scholarships Create and send the admission letter and other relevant documents
 - Step 1 could be completed by the Admissions Office if the relevant Graduate School staff were transferred to Enrollment Management.
 - Step 2 could be completed by the departmental graduate coordinator or departmental admissions committee that completes the department-level evaluations with guidance from the financial aid office. Given the complexity of international evaluations, extensive research and training would be required for departments to successfully complete this function.

- Step 4 could be completed by Enrollment Management, as they currently do for undergraduate students.

International Student Recruitment and Support

- In its annual report to the senate, the Internationalization Standing Committee encouraged the Administration to develop an enrollment plan to attract and support international undergraduate and graduate students, as is outlined in the University Strategic Plan Implementation Plan (Goal 2, Objective 4, Item 6). The committee also reiterated the need for the University to consider all aspects of the international student experience. While this is obviously a strategy that has the potential to help alleviate Bradley's enrollment difficulties, support for international students must be enhanced by a more clearly articulated administrative platform for recruitment *and* retention of international students through the Office of International Student and Scholar Services (OISSS) and all other relevant units. In addition, increased numbers of international students on campus will enhance the goal of global learning only if concerted efforts are made to provide both academic and co-curricular opportunities for international-domestic student interaction.
- As suggested above, if the duties of the graduate school were reassigned, one possibility would be for OISSS to be a direct report to the Provost's Office.

Orientation and Advising

- Currently the Graduate School and the departments are responsible for providing orientation activities for new graduate students. The departments, individual colleges, and Student Affairs could deliver this orientation programming in the absence of a graduate school.
- Academic advising is currently and would continue to be the responsibility of the department. It is important to note that the Graduate School currently advises all non-degree seeking students, and the needs of these students cannot be overlooked.

Clearing Students for Graduation and Record Keeping

- Currently, the graduate school completes these duties.
- Clearing students for graduation after they have completed the degree requirements could be done by individual colleges.
- The Library could assume the duty of publishing theses for programs that require them.
- Record keeping could be completed by the Registrar's office

Table 2.12: Reduce redundancy between campus units

With changes to the annual Statistical Profiles that are published by the Registrar’s office, it is difficult to gather reliable data to analyze the current employment situation at Bradley. Ratios for Students per Administrator, Staff Member, Non-Exempt Staff Member, Full-time Faculty, and Part-time Faculty under the Provost’s area of responsibility were last reported in 2017. Values for these ratios from Fall 2009 to Fall 2017 are summarized in the following analysis:

<i>Ratios for Students per Employment Sector Under Provost’s Responsibility</i>									
Students per	2009	2010	2011	2012	2013	2014	2015	2016	2017
Administrator	320.2	319.9	311.5	297.7	290.6	282.5	272.8	273.9	277.47
Prof. Staff	66.3	65.7	62.3	62.5	66.5	66.1	66.58	67.34	67.37
Non-Exempt	52.3	51.7	50.4	49.3	50.2	48.4	50.87	51.68	53.2
Full-time Fac	14.7	14.7	14.6	13.6	13.6	13.2	13.29	13.72	13.87
Part-time Fac	76.2	87.3	79.2	74.3	69.7	71.8	76.16	68.24	69.68

As can be seen from this data, the sectors that have seen the largest decreases in ratios during this period are the Administration and Part-time Faculty. Given that few part-time faculty will be used during FY21 and the Voluntary Separation Program has reduced the number of full-time faculty, the student-faculty ratio for full-time faculty will likely increase markedly this academic year. Because faculty have more direct contact with students than most other university employees, additional cuts to faculty lines would have a disproportionate (and negative) impact on the student experience.

Mindful of the fact that the number of administrators (relative to students) has increased substantially over the last decade, we recommend identifying redundancies in Bradley’s administrative system, along with a strategic realignment of administrative personnel. For instance, although the University has central offices in charge of marketing, development, enrollment/recruitment, graduate programs, and institutional research, many colleges have found the need in recent years to hire their own professional staff in these areas. This has added to increased expenditures for administrative positions across the university. Two key questions must be asked. First, what is happening in the university-wide administrative units (marketing, development, advising, enrollment, etc.) that has left many Deans feeling that the needs of their colleges are not being met? And second, is the best solution to these problems to hire multiple staff to do the same job in different colleges, or to improve the processes (and perhaps staffing) in the centralized offices? Taking a hard look at this issue has the potential to both cut costs and enhance student recruiting/retention and development efforts.

We recommend the University Resource Committee engage in a careful review of the Huron recommendations. We recommend that the URC suggest solutions to potential redundancies in university administration and to evaluate potential outside vendors for cost savings.

Likewise, academic programs should strive to reduce instructional redundancies. Based upon course descriptions and instructor feedback, it appears that multiple departments offer very similar courses. In some cases, this may be pedagogically justified. In other cases, it might represent an inefficient use of teaching power. Our graduates will work with individuals from a variety of educational and personal backgrounds. Taking courses from across the university provides greater opportunities for students to interact with others with different life experiences/goals and provides them with alternative perspectives for how to solve problems. Our goal should not be to train individuals to do a particular job (within one discipline), but rather to develop problem solving skills, respect for others who may be “different” from them, and to instill a love of learning. We therefore recommend undertaking a review of instructional overlaps. This issue has an impact on our short-term staffing issues, on the development of our students, and on the long-term health of the University.

We recommend the University Curriculum and Regulations Committee engage in a careful review of the portfolio of course offerings that may appear redundant and to review course/program addition and modification processes to optimize curricular offerings while also recognizing disciplinary values.

Revenue Generation

We have estimated that the items listed below could produce over **\$11 million** in new revenue for the University.

- 1) In the short-term, we strongly suggest that the necessary "discounts" are offered to meet our FA 20 freshman enrollment goal. We cannot afford to lose four-years of potential revenue simply because students received a few thousand dollars more from a peer institution.
- 2) We must be more effective at fundraising. Over the past decade, the financial markets have increased significantly, but donations to the University have decreased. We are long overdue to launch a major public capital campaign, and we strongly suggest that one is launched in response to the challenges that the COVID-19 pandemic has created for the University.
- 3) We need to re-evaluate our tuition structure (differential tuition, total cost relative to peers, etc.)
- 4) We must change our enrollment goals from focusing on the number of student deposits to Net Tuition Revenue.
- 5) We need to improve our messaging to regain the market share that we once held with undecided majors. Deposits in our Academic Exploration Programs (AEP, UNV, etc.) have declined in recent years.
- 6) Revenue from Auxiliary areas continues to lag behind our peers. Is it time to reevaluate contracts with outside vendors and eliminate unnecessary rentals?
- 7) Alternative cash management practices need to be developed so that income can be generated from our cash reserves (ex. after tuition is collected each semester).
- 8) In an effort to increase the number of individuals who are seeking grants and contracts, support staff must be hired and more credit should be given to grant-seeking activities in the tenure and promotion process.
- 9) Sell memberships for the Markin Center to BU alumni
- 10) Investigate leases for properties that the University owns and consider selling properties that are incongruent with the long-term goals of the University (example: Land under the USDA lab)
- 11) Evaluation of summer programming*

**Some strategies that the committee has discussed to increase summer enrollments include:*

- Be more strategic with the offering of courses:
 - Promote plans for accelerated degree completion (3-year plans)
 - Ensure that sufficient BCC courses are offered especially our unique requirements
 - Offer and market courses that others are not offering to attract students from other institutions.
- Clarify the role and mission of Continuing Education, especially as it relates to credit/non-credit bearing courses, and its relationship to community/external partners.
- Develop a “Bradley Corps” to help students off-set expenses

One Example: “College of Wooster is trying to hold on to financially struggling students, and their tuition dollars, by offering minimum-wage summer jobs in its “WooCorps,” which has almost 200 students painting rooms, landscaping and growing vegetables this summer. WooCorps students will get an extra \$1,000 in their financial aid packages — and help the college complete more maintenance projects than usual.”

- Investigate how other institutions are able to offer federal and state grants to students during the summer.
- Consider offering greater “discount rates” for Bradley students to make our courses more attractive, which could lead to increased revenue (may even increase housing revenues)

Based on information in the table below: If a three-credit hour course (\$910 per credit hour) is taught by a faculty whose 9-month salary is \$70,000 per year, the salary and benefits would be ~\$6,125 using the current formula for calculating a summer salary. In the examples below, it is assumed that at least one of the enrollees is a dependent of an employee because of the frequency with which this occurs.

Class Enrollment	Discount Rate	Potential Tuition from 3 credit hr course	Estimated Actual Tuition (Assumes one dependent of employee)	Faculty Salary	Benefits (25%)	Net Revenue	Increased Revenue from increased enrollment after discount
5	0	\$ 13,650	\$ 10,920	\$ 4,900	\$ 1,225	\$ 4,795	
6	15%	\$ 13,923	\$ 11,603	\$ 4,900	\$ 1,225	\$ 5,478	\$ 683
7	25%	\$ 14,333	\$ 12,285	\$ 4,900	\$ 1,225	\$ 6,160	\$ 1,365
8	35%	\$ 14,196	\$ 12,422	\$ 4,900	\$ 1,225	\$ 6,297	\$ 1,502

9	40%	\$ 14,742	\$ 13,104	\$ 4,900	\$ 1,225	\$ 6,979	\$ 2,184
10	47%	\$ 14,469	\$ 13,022	\$ 4,900	\$ 1,225	\$ 6,897	\$ 2,102

- Fund (and consider increasing) internal grant programs that faculty frequently use to hire students to conduct research during the summer; win-win because it:
 - encourages alumni giving because they understand the benefits (ex. Dept. of Chemistry and Biochemistry)
 - increases experiential learning opportunities for students
 - helps faculty obtain preliminary results to support external grant proposals
 - helps students pay the tuition to enroll in summer courses

Long-term strategies that will help us fulfill our vision

We recommend building on our ability to offer and market a high quality, transformational educational experience by:

- 1) Establishing Bradley as a market leader in high quality, interdisciplinary (convergence) programs, including the development of more streamlined course/program approval processes and more nimble mechanisms for dual appointments. Progress has been made in this area, but we cannot lose this momentum by tabling these discussions while we address our immediate challenges.
- 2) Expanding student engagement opportunities.
 - a. Increasing *opportunities for faculty-student research/professional engagement*, ideally with resources, but more immediately with structural changes such as calibrating teaching loads and reforming tenure and promotion requirements in ways that encourage faculty to engage in such collaboration, and adequately funding the Sponsored Programs position.
 - b. Increasing *engagement in the local community*. Using our knowledge and expertise across disciplines to work with local partners in ways that provide real solutions to societal, economic, environmental and political crises would simultaneously build the capacities and marketability of our students. We suggest adopting a Bradley Promise, pledging that all students will have real-world engagement opportunities. This could be further enhanced by issuing students with a Workplace and Community Engagement Transcript and/or electronic certificates signifying professionalism and work-readiness.
 - c. Increasing *global engagement*. We already do a great deal on this score in terms of study abroad; majors/minors; global scholars programs in almost every college; etc. However, these efforts have been bottom-up and not coordinated, due to lack

of prioritization and promotion from upper administration. There is a great deal of potential here, and some immediate low-hanging fruit that is likely to yield enrollment increases, as identified by the new Senate Standing Committee on International Initiatives.

- 3) Strengthening Bradley's diversity, equity and inclusion efforts in meaningful ways that make us stand out from our competitors, for instance with a Diversity and Inclusion Fellows program (for faculty) and a Diversity and Inclusion certificate program for students; developing challenge grants for stakeholders to pilot innovative and sustainable programming; and supporting hiring initiatives that increase the diverse representation of faculty and staff.
- 4) We have suggested in this White Paper that our tuition is too low relative to our peers. If we were to significantly increase our tuition over time, we would need to justify the increase to retain current students. *Proposal:* Investigate changes to the University calendar. Options: 1) Many institutions have 15 instructional weeks plus finals where as we only have 14 weeks plus finals. This may help departments cover the material that accreditors mandate if we move to 120 hrs needed to graduate. 2) Consider a mandatory January Interim session that heavily focusses on experiential learning. Bradley's vision: *Bradley is the leader in experiential learning.* We truly could become the leader if we had more dedicated time during the academic year to pursuing this goal. Providing all students with the opportunity to complete 35 hours each academic year will also improve our 4-year graduate rates. 3) Consider a year-round academic calendar to maximize operations during the summer (this could include a 40 credit-hour option across three trimesters).
 - We currently have four non-academic year sessions (January, May, Summer 1, and Summer 2) which does not appear to be common. Do they provide as much revenue as could be gained from increasing our fall and spring tuition?

Statement on Bradley's Student Engagement

An institution of higher learning should teach its students “...the means of living an independent, industrious and useful life by the aid of practical knowledge of the useful arts and sciences.”

Lydia Moss Bradley

A fundamental challenge of private, residential colleges and universities is to find distinctiveness and to communicate added value within a crowded marketplace that increasingly includes online and relatively less expensive options for baccalaureate credentials. Inspired by Bradley's long-standing commitment to the development of useful skills, Bradley's vision of a 21st century, residential education is to relentlessly challenge students to confront real-world problems.

There are several objective indicators that Bradley is succeeding in its authentic commitment to engaged learning, despite the crowded market:

- The Wall Street Journal ranked Bradley University among the **top 25 private universities for Student Engagement** in 2020. (We have recently ranked as high as #6.)
- Princeton Review ranked Bradley University in the **top 25 of all universities for internships** and applied work experiences in 2020. (We have recently been ranked within the top 15.)
- The Brookings Institute ranked Bradley University **#19 in terms of Value-Added Mid-Career earnings**. (Putting us in the company of institutions such as Stanford and MIT.)

These achievements are the result of a deliberate strategic investment in High Impact Practices (HIPs), as defined by the AAC&U. In terms of added value, there is a wealth of data to indicate that HIPs increase freshman-to-sophomore retention (a key element of sustainable revenue) and drive early career outcomes. Together, these activities are powerful drivers of Bradley's 93% placement rate (based on an astounding 96% knowledge rate).

There are three key areas that represent Bradley's commitment to engaged learning. First, the Bradley Core Curriculum (BCC) was approved by University Senate in 2015. **Among the five Core Outcomes of the BCC is *Practical Application*: Bradley graduates will apply knowledge and skills from the classroom to real-world situations.** This emphasis on practical application is relatively rare in the general education landscape. In addition, Bradley adopted the HIP of Writing Intensive (WI) Coursework, such that ALL students complete two WI courses, typically within individual disciplines.

Second, the Bradley University Strategic Planning Committee revised Bradley's mission, vision and values statements in advance of developing the 2017-2022 Strategic Plan. Bradley's vision to become the *Leader in Student Engagement* was specifically intended to draw upon existing strengths, to work to ensure that lesser institutions could not steal our message, and to compete in this arena at the highest level. For example, Elon University is broadly viewed as a leader in engaged learning. **According to Elon's website, 96% of Elon students participate in two or more "high-impact learning practices." We seek to ensure that 100% of Bradley students complete three or more HIPs.**

Our hubris was based, in part, on the notion that, as far back as 2015, Bradley compared reasonably well to Elon on a number of key indicators:

- Complete an internship (Elon 89%, Bradley 72%, National Average 49%)
- Have a culminating senior capstone experience (Elon 87%, Bradley 64%, National Average 45%)
- Work with a faculty mentor on a research project (Elon 42%, Bradley 30%, National Average 23%)
- Study abroad (Elon 78%, Bradley 28%, National Average 11%)
- Participate in a learning community (Elon 42%, Bradley 25%, National Average 23%)

This comparison is based on Bradley's participation in the **2015 National Survey of Student Engagement (NSSE)**; data is based on responses from seniors that self-reported completion of each activity; Elon data is prominently available on their website.

Third, Bradley's Quality Initiative for the 2020 Higher Learning Commission accreditation process was to further drive market distinctiveness by ensuring that ALL Bradley students learn to apply skills to problems. The Experiential Learning (EL) Core Practice was developed for the 2017-18 incoming class. **Thus, two EL experiences, which are based on five experiential HIPs outlined by AAC&U (study abroad, internships, mentored research/creative production, culminating senior capstone experience, service/community-based learning) are now a requirement of all students.** Considering that the other BCC Core Practice (each Bradley student completes two Writing Intensive Courses) is also defined as a High Impact Practice, it can be anticipated that Bradley will soon surpass Elon in terms of participation in two or more "high-impact learning experiences." Given that each of the Elon comparison indicators above are included in the BCC EL portfolio, we anticipate significant increases in each area. Thus, Bradley looks forward to the next opportunity to participate in the NSSE. Moreover, as the portfolio of EL offerings fully matures and as the current cohort of seniors graduates in Spring 2021, Bradley will have real-time, quantitative data that confirms our exceptional level of engagement.

These structural initiatives have already paid dividends. For example, Bradley was recently selected to share our successes in a new book that focuses on structural implementation of High Impact Practices, edited by Jillian Kinzie, the Director of the NSSE Institute (Experiential Learning for ALL Students: A Construct of Five HIPs (Gruening-Burge, McConnaughay, Niedy)).

In addition, the Council of Undergraduate Research (CUR) selected Bradley as one of 12 institutions for funding as part of the National Science Foundation Transformations Project, the goal of which is to embed undergraduate research across a backwards-designed, scaffolded curriculum. This project not only advances problem-based learning, but also draws under-represented groups into STEM and research-driven fields.

Other examples include the development of a Global Living and Learning Community, and the development of a First Year Seminar in the College of Liberal Arts and Sciences (which, to date, has fueled a freshman to sophomore retention rate of 93%).

Engaged learning at Bradley is informed by its founder, and has been strategically advanced over the past decade. This type of transformational education is accessible to all students through our ability to leverage community partnerships, our rich portfolio of student organizations, and a community of faculty, staff and alumni that are dedicated to transformational learning and

cultivating lives of purpose in our students. While most of these successes have developed without substantial revenue investments, it must be noted that much of this important work requires sensible student-to-faculty ratios and faculty teaching loads.

In conclusion, engaged learning is not simply a marketing slogan at Bradley. It is the cultural foundation that binds together our community of students, staff, faculty, and alumni across our five colleges. **The BUSPC selected student engagement as our strategic touchstone, not simply so that we could dip our toes into an already crowded pool. Rather, it was selected because the market was stealing our message; we seek to own the pool.**

Given that our website and our marketing materials rarely reflect these foundational strengths, it would not be surprising if new leadership were unaware of these strategic and structural achievements. We have provided in Appendix A (below) a comparison of Bradley's and Elon's marketing with respect to Student Engagement. This comparison is designed to contrast Elon's *marketing approach* with Bradley's. Bradley's profile is not identical to Elon's – with the former including a College of Engineering and the latter including a School of Law – but the student engagement focus of both schools allows for a useful comparison.

Appendix A: Positive Press and Marketing

Elon is a good example of a university that has redefined itself by establishing and marketing a clear vision. Their website is indicative of this strategy, and a comparison of Elon's and Bradley's websites yields several major differences. Elon's website focuses clearly on the university's vision and mission, and very intentionally demonstrates how this mission is fulfilled by highlighting the university's accomplishments. (At the end of this Appendix, we have included representative text from Elon's website.) In comparison, Bradley's approach does not appear to be as effective.

Below are a few of the accolades that Bradley has received that demonstrate fulfillment of our vision, but we have buried them in the public relations section of our website rather than using them as headlines throughout the site. Is the intended audience—prospective students and parents—ever finding them? The following heading on our homepage seems like a reasonable place to consider putting this type of information, because no information is currently provided to support our claim that our size makes a “Big Difference.” Is our size what makes us Bradley or is it our ability to deliver what is stated in our vision and mission statements?

Mid-Sized. Big Difference.

When you choose Bradley University, you don't have to choose between the activities and resources of a larger university and the personal attention and exceptional learning experiences of a smaller college.

Our size - about 5,400 students - gives you the best of both worlds

Examples of just a few of Bradley Accolades that Speak to our Commitment to our Vision

- ***Bradley Named Among Nation's Best for Student Engagement***
<https://www.bradley.edu/offices/communications/pr/releases/article.dot?id=98f7d797-9561-4d0e-b20d-e40fd83adc49>
- ***Bradley Ranks 6th in Nation for Student Engagement***

<https://www.bradley.edu/offices/communications/pr/releases/article.dot?id=9e26f90e-cc15-44da-b606-9e1363fc6b31>

- **US News & World Report Names Bradley Best in Illinois**

<https://www.bradley.edu/offices/communications/pr/releases/article.dot?id=0a1b8b39-815f-43a5-af8d-9a0eb0d39d18>

- **Brookings Institute, Beyond College Rankings: A Value-Added Approach to Assessing Two- and Four-Year Schools** https://www.brookings.edu/wp-content/uploads/2015/04/BMPP_CollegeValueAdded.pdf

- Bradley was in very elite company here, but this positive press was only featured in the news section of our website initially, and now can only be found on the Bradley website (<https://www.bradley.edu/>) after scrolling down several screens as a five-word catch phrase, **“Top 20 Salary Boosting School.” We are in the top 20 for the nation, but prospective students (and parents) have no frame of reference when it is presented this way.**

	Value-added	Predicted	Actual	Metropolitan area
California Institute of Technology	49%	\$77,129	\$126,200	Los Angeles-Long Beach-Anaheim, CA
Colgate University	46%	\$79,774	\$126,600	Syracuse, NY
Massachusetts Institute of Technology	45%	\$82,439	\$128,800	Boston-Cambridge-Newton, MA-NH
Rose-Hulman Institute of Technology	44%	\$73,628	\$114,100	Terre Haute, IN
Carleton College	43%	\$76,236	\$117,700	Faribault-Northfield, MN
Washington and Lee University	42%	\$81,281	\$124,300	Lexington, VA
SUNY Maritime College	42%	\$79,637	\$121,700	New York-Newark-Jersey City, NY-NJ-PA
Clarkson University	42%	\$72,583	\$110,700	Ogdensburg-Massena, NY
Manhattan College	42%	\$72,701	\$110,800	New York-Newark-Jersey City, NY-NJ-PA
Stanford University	41%	\$83,864	\$126,400	San Jose-Sunnyvale-Santa Clara, CA
Harvey Mudd College	40%	\$89,466	\$133,800	Los Angeles-Long Beach-Anaheim, CA
Rice University	40%	\$80,379	\$119,900	Houston-The Woodlands-Sugar Land, TX
Marietta College	39%	\$62,795	\$93,100	Marietta, OH
Virginia Military Institute	38%	\$78,444	\$115,000	Lexington, VA
Polytechnic Institute of New York University	37%	\$76,245	\$110,400	New York-Newark-Jersey City, NY-NJ-PA
Worcester Polytechnic Institute	37%	\$76,688	\$110,500	Worcester, MA-CT
St Mary's University	36%	\$64,500	\$92,500	San Antonio-New Braunfels, TX
Stevens Institute of Technology	36%	\$82,827	\$118,700	New York-Newark-Jersey City, NY-NJ-PA
Bradley University	35%	\$67,307	\$95,500	Peoria, IL
Georgia Institute of Technology-Main Campus	34%	\$79,195	\$111,700	Atlanta-Sandy Springs-Roswell, GA
Average of all four-year and higher colleges	9%	\$68,790	\$75,900	

*Value-added in this calculation is the difference between actual and predicted earnings in log values. A zero value-added measure means the school's students earn the average for students like them at similar types of colleges.
Source: Authors' analysis of various sources*

Summary of Elon University’s website (<https://www.elon.edu/>) - All examples are direct quotes.

ELON has built a reputation as a university like no other, a school that transformed from a small North Carolina liberal arts college to become a prestigious [national university](#) with 7,000 students from around the world.

Elon’s remarkable growth is tied to two central beliefs:

- Students learn most deeply through engaged, hands-on experiences.
- Students’ lives are transformed through personal relationships with faculty and staff whose first priorities are teaching and mentoring.

Now, in a time of fundamental change, Elon University has emerged as the leader in defining what matters most in a college education.

The “Best Colleges” guide ranks Elon **#2 for excellence in undergraduate teaching, #11 for innovation** and the **national leader** in eight academic **programs focused on student success**.

Elon is [the **only** university in the nation](#) recognized in all eight categories of high-impact academic programs. (U.S. News)

- **#1** Study Abroad
- **#1** Learning Communities
- **#2** First-Year Experiences
- **#2** Service Learning
- **#4** Undergraduate Research/Creative Projects
- **#4** Internships/Co-ops
- **#5** Senior Capstone
- **#10** Writing in the Disciplines

Elon undergraduates lead the nation in engaged learning:

- **Study abroad** (Elon **78%**, National Average 11%)
- **Complete an internship** (Elon **89%**, National Average 49%)
- **Hold a leadership position** (Elon **71%**, National Average 35%)
- **Work with a faculty mentor on a research project** (Elon **42%**, National Average 23%)
- **Participate in a learning community** (Elon **42%**, National Average 23%)
- **Have a culminating senior capstone experience** (Elon **87%**, National Average 45%)
- **Participate in two or more “high-impact learning practices”** (Elon **96%**, National Average 60%)
- (Sources: Elon student surveys, National Survey of Student Engagement, Institute of International Education)

With a four-hour course structure and an innovative one-month Winter Term, students have more time for experiential learning. All classes are taught by [faculty scholars](#) who are deeply committed to their vocation of teaching. Their dedication extends beyond the classroom as they form mentoring relationships with students that last a lifetime.

One-year outcomes for the class of 2018

94% Graduates who were employed, in graduate school, completing fellowships or working for service organizations

95% Graduates who accepted positions related to their career goals

89% Graduates who completed internships

What it takes to be a “Best-Value”

[NOTE: if Bradley is to compete based on “accessibility”, the strategy indicated and marketed by Elon—again firmly tied to demonstrated differentiation in engaged learning—may be a better one than “accessible” or “affordable”.]

Elon has never favored the “high price, high discount” model found at other top private universities.

We understand that the cost of a college education is daunting for most families. So Elon has adopted **three strategies** that favor students and consistently earn top [“best-value” rankings](#) for the university.

A reasonable total price

With a [lower “sticker price”](#) than most peer institutions, Elon effectively gives every student a substantial up-front scholarship.

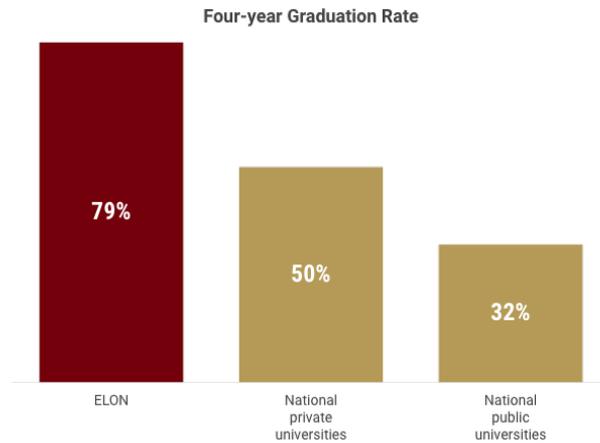
Boston College	\$73,311
Georgetown University	\$72,524
Bucknell University	\$72,370
Wake Forest University	\$70,458
Villanova University	\$69,724
Lehigh University	\$69,650
Santa Clara University	\$69,141
Vanderbilt University	\$68,980
Emory University	\$68,776
Davidson College	\$67,794
University of Richmond	\$67,590
Rollins College	\$66,150
Furman University	\$64,620
Loyola University Maryland	\$63,410
Rice University	\$63,252
Ithaca College	\$60,844
Butler University	\$56,660
Creighton University	\$52,674
Average	\$66,552
Elon University	\$49,256

The four-year advantage

College costs overwhelm many students because they take five or six years to graduate. This means higher tuition and housing costs along with delayed entry into the workforce.

[In this regard, it is noteworthy that the proportion of Elon students receiving Pell grants is below 10% whereas more than 30% of Bradley’s students receive these awards. While this may mean that Elon does not discount at the same rate, it also means that the impact of a Bradley education is arguably MORE transformative for our students, based on socioeconomic backgrounds and the value of a Bradley degree.]

Elon's four-year graduation rate ranks #35 among U.S. News National Universities. A well-managed class schedule allows students to get the courses they need, and credits from the one-month Winter Term, included in the cost of fall tuition, help ensure an on-time graduation.



(Sources: Elon U.; National Center for Educational Statistics, 2011 cohort)

Using tuition to fund what's most important: learning

The average private college uses more than 50 percent of total tuition revenue to fund financial aid. This tuition discount practice has forced many schools into budgetary crisis.

Elon takes a different approach. With more reasonable costs for tuition, room and board, there is less demand to discount tuition. As a result, Elon is better positioned to use tuition dollars to fund innovative academic programs and student services.

AD HOC RECOMMENDATIONS FOR SENATE ACTION

The committee shall formulate specific recommendations to identify practical cost savings, revenue enhancements, and other financial opportunities which will lead to short and long term success consistent with Bradley's core values and academic mission.

In support of the charge of the Senate Ad Hoc Committee's work, several recommendations have been generated that largely rely on the cooperation and responsiveness of individuals and officials across campus. However, we have additionally generated several recommendations that are wholly within the agency of the University Senate or its standing committee structures. It is our belief that by acting on the recommendations below, Senate will be better positioned to advance university objectives and secure future success.

1. Bradley University Strategic Planning Committee: Evaluate current plan, identify vital or in-progress tactics for completion, and develop an aggressive plan to sunset the current plan. Work to develop a new plan that is truly strategic, limited in focus, linked to development, and imbued with accountability.
2. Bradley University Strategic Planning Committee: Work to aggressively improve (or develop an acceptable alternative to) the model for program prioritization. It is deeply troubling to consider making long-term academic decisions based on an incomplete and immature system.
3. University Resources Committee: review Huron recommendations and work to develop alternative pricing and delivery models.
4. Curriculum and Regulations: Evaluate course and program addition/modification procedures and generate recommendations that minimize curricular redundancies.
5. Tenure, Promotion and Dismissal: Initiate a comprehensive review of tenure, promotion, and dismissal criteria to foster the development of criteria that a) represent Bradley values and mission, b) represent 21st century ideals, and c) are broadly accepted and understood by the current Bradley professoriate.



**Bradley University Senate
Eighth Regular Meeting of the 2019-2020 Senate**

3:10 p.m. – 5:00 p.m., May 6, 2020

Online

Minutes DRAFT



MISSION:

Bradley University empowers students for immediate and sustained success in their personal and professional endeavors by combining professional preparation, liberal arts and sciences and co-curricular experiences. Alongside our dedication to students, we embrace the generation, application and interpretation of knowledge.

Agenda

I. Call to Order at 3:20

II. Approval of the Minutes (See [Attachment 1](#))

Motion to approve: Sen. Banning; 2nd: Sen. Heuser

Discussion: None

Motion Carries

III. Reports from Administrators

A. President Gary Roberts

- Pres. S. Stadifird and new CFO J. Blade are working full-time for Bradley. They will oversee all matters for fall and beyond. Pres. G. Roberts and CFO Gandhi will work with them for a seamless transition.
- Phase 2 of BECC construction is suspended, could save about \$4M. The city inspection shows very minimal needs done to cap off the building. Demolition is close to done, and site work needs to be finished.
- Test optional will be implemented next year. Next week an general communication will go out to explain test optional to potential students.
- Graduation planning: preparing videos with brief speech from G. Roberts to be shown next Friday and Saturday to celebrate the graduating class. In-person commencement will be held in Fall semester probably in December around the regular commencement.
- Thank you and goodbye to all. Truly rewarding and ometimes fun 9 semesters. Did some things well and some could be done better, but feels good about things that have happened and feels good about Bradley. His 50th reunion is this fall. Appreciation for support and friendship from faculty and staff.

President Stephen Standifird:

- Originally planned to arrive June 15, but advantage of coming on now is that he can plan strategically for fall. Impact of the virus is not known, but it will be significant. It is to Bradley's advantage to have 2 presidents.
- First formal communication will be on Thurs or Fri. Confident we'll get through this, but over the next month will set the process for the next 2 years.
- He is forming an advisory group to help him, CFO, Provost form a plan.

CFO Jeff Blade:

- Butler grad – from the for-profit world, but has upheld the importance of higher ed through his career.

Questions:

- Sen. George asked about construction processes not yet done in BECC.
 - GR: final work in the new building will be completed.
- Sen. Pres. Fakheri asked if Phase 2 be completely cancelled?

- GR : It is suspended. It may be a few years into the future, and construction may resume or there may be a redesign.

B. Senior Vice President of Academic Affairs and Provost Walter Zakahi

- USPC has not been meeting regularly – only 2 since break due to online shift. When they reconvene they will identify the parts of SP we can pursue given these constraints.
- Continuous Improvement will be the focus.

Questions

- Sen. Blair asked about Qualtrics ending on June 1; noted that multiple studies are ongoing on Qualtrics.
 - Walter Zakahi: Qualtrics more than doubled price. Looking for alternatives.
 - Zach Gorman: Other schools are in the same boat. License fees almost tripling which is non-sustainable. A message will be going out to campus to work with each person involved to extract data and put it into a new system as soon as possible
- Sen. Goitein added that students use Qualtrics for the experiential component of their coursework; its not just for professors' sresearch.
- Sen Schweigert added that Psych uses it for class, research and administrative purposes.
- An additional Senator noted that for Marketing it's a game changer.
 - ZG: reiterated the game plan for the next steps. Indy licenses, and some other enterprise solutions will be offered.

IV. Report from Student Senate President Megan Brezka

- Emma Hoytya, new Student Senate President, attended.
- She has met with S. Standifird.

V. Consent Agenda

ID	Document	Name	Description	Submit	Due
191050	Core Curriculum Addition	Dawn Roberts	PSY PSY 295 Fundamentals of Directed Research	3/27/20	1/20/21
189196	Core Curriculum Addition	Kevin Capie	COM COM 360 Digital Journalism	2/25/20	1/20/21
188797	Core Curriculum Addition	Rachelle Pavelko	COM COM 480 Public Relations: Case Studies and Campaigns	2/10/20	1/20/21
188647	Core Curriculum Addition	Dawn Roberts	PSY PSY 495 Directed Research Experience	2/3/20	1/20/21
191051	Course Addition	Dawn Roberts	PSY PSY 295 Fundamentals of Directed Research	3/27/20	1/20/21
191048	Course Addition	Melvy Portocarrero	WLC WLS 440 Historical Memory in Post Franco Spain	3/27/20	1/20/21
190594	Course Addition	Dawn Roberts	PSY PSY 495 Directed Research Experience	3/22/20	1/20/21

190544	Course Deletion	Joshua Lewer	ECO Q M 260 Quantitative Methods in Finance	3/20/20	1/20/21
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Motions are from Committee. No division or objections voiced.

Motion carries by consent.

VI. Ad hoc Committee Charge and Membership

The committee shall formulate specific recommendations to identify practical cost savings, revenue enhancements, and other financial opportunities which will lead to short and long term success consistent with Bradley’s core values and academic mission.

- Aaron Buchko
- Bernard Goitein
- Brad Andersh
- Jacqueline Hogan
- Jeanie Bukowski
- Joshua Dickhaus
- Paul Wayvon
- Teresa Drake
- Timothy Koeltzow
- Yufeng Lu

DRAFT

Motion to approve membership: Sen. Glassmeyer; 2nd: Sen. Bosma

Discussion:

- Sen. Hogan: Committee has met once. They welcome input.
- Sen. Wiley asked what the difference is between URC and new committee formed.
- Sen. Bukowski: This committee draws on primary committees, so Contractual Arrangments, URC and SPC etc can bring expertise together.
- Sen. Pres. Fakheri commented on the fast turn around for the committee in May and June. He is scheduling a meeting in June with this committee and administration.
- S. Standifird: offered help from admin, noting that this group and the advisory group will be exciting to have all good minds together.
- Sen. Pres. Fakheri noted that for decisions we need data and access to financial data will be crucial.
- S. Standifird: one proviso—no one knows that the final impact will be.

Approved, with some nays voiced.

VII. Report from the Senate Committees

1. **Student Grievance Committee** – No Student grievances at the University level.

2. Committee on Equity and Diversity-

The Committee on Equity and Diversity worked throughout the Fall in the guidelines, application form, and rubric for the grant "Diversity and Inclusion Initiative" as requested by the Provost in alignment with the Goal 3 of the University's Strategic Plan. The mission of the D & I Initiative is to fund lectures, exhibitions, workshop(s), performances and other events that enrich campus life through the presentation of ideas and cultural experiences related to diversity, inclusion, accessibility, equity, and belonging.

At the end of the Fall such grant guidelines and application form were shared with Cara Wood from Student Activities, Norris Chase and Jhoanna Vega-Rocha from Diversity and Inclusion and Heljä Antola Crowe from CTEL, in order to get their feedback. Based on their feedback and recommendations, in the Spring Semester the committee got together and worked on editing such forms as well as developed a formal mission statement and goals and a grant memorandum for those individuals or organizations awarded with such grant. The documents were ready right before the Spring Break, but they were not submitted to the Provost Office in consideration that there are more important concerns and priorities at this time.

Once there is an announcement on when students will be back to campus, the committee will send the documents to the Provost Office for its consideration and its reassurance that there are funds for such grant. Once the Provost Office determines whether or not there is money for this initiative, the committee will request the Office of Diversity and Inclusion and CTEL to announce and advertise it in their webpages.

3. Admissions and Retentions Committee -

From: Bernard Goitein <bjg@fsmail.bradley.edu>

Subject: ARC report

Date: May 1, 2020 at 2:55:09 PM CDT

To: Ahmad Fakheri <ahmad@fsmail.bradley.edu>

We met to discuss two major topics: The sharp decline in Academic Exploration Program (UNV AEP) deposits in Fall 2019 from the year before; and the Test Optional Proposal (TOP) .

Re UNV AEP: Please see summary of discussion, that notes, " Fortunately we are still successful in generating satisfactory number of UNV AEP applications and UNV AEP admits, so Bradley recruitment and admission staff might take steps, so that admitted AEP students once again enroll at rates of earlier years."

Re Test Optional Proposal (TOP): Please see summary of discussion, that includes topics such as potential benefits of TOP, how it fits with applicants use of the " Common Application," and TOP challenges for Bradley decision making in technical areas.

Bernard Goitein, Ph.D.
Professor

Management and Leadership
Chair, Admissions Committee

I. Concerns re Academic Exploration Program (UNV AEP) were shared at the Admissions Committee.

Concerns: The Committee shared concerns with the 2019 decline in Academic Exploration Program (UNV AEP) deposits (See embo report). This decline was not associated with a corresponding surge in deposits for other undergraduate majors.

Fortunately, we are still successful in generating satisfactory number of UNV AEP applications and UNV AEP admits, so Bradley recruitment and admission staff might take steps, so that admitted AEP students once again enroll at rates of earlier years.

Background: Bradley's five Colleges offer an especially broad range of majors. Without the Academic Exploration Program, some students come to campus and declare a major, and then change majors, often more than once. Bradley's AEP helps address this problem, with vocational interest testing, individual advisers and special classes, so that these students find the major right for them, the first time.

The Academic Exploration Program has generated favorable enrollments of these AEP students at Bradley, enrollments that have "historically supported undergraduate enrollment over the last several decades," where students start in Bradley's AEP, and then transfer to the major that is right for them. The number of UNV AEP students had continued to support our undergraduate enrollment, even as other schools also began to offer versions of AEP.

Action Options: Administration representative pointed to changes in applicants/prospective student body as potential causes. The rise in "first generation" college students is one such.

These students (and their families) may have less awareness of the problem that AEP was designed to address (declaring a major, changing majors, often more than once), hence reduced attraction to Bradley's AEP, with its vocational interest testing, one-on-one advisers and special classes, where students find the major right for them, the first time.

As such, Bradley might implement practices to better promote awareness of AEP and its value to these "first generation" college students and their families .

II Test Optional

On the positive side, our discussions noted the possibility of the Test Optional Proposal (TOP) attracting otherwise desirable applications to Bradley from students with favorable high school records (HSGPA), yet relatively low SAT/ACT test scores. Data regarding that point are reported

in <https://www.nacacnet.org/globalassets/documents/publications/research/defining-access-report-2018.pdf>

In that context, page 67 of the report states: " We also agree with characterizations of the most likely students to have strong HSGPAs and low testing: women, First-Generation to college, low income students, and students who speak a second language at home.21"

The Committee discussed our students use of the Common Application , where they specify test scores, when needed, but not specify them, if so preferred, were we to become a TOP school. Discussions revealed how TOP would fit with the typical BU applicant, about 80% of whom rely on the Common Application, "... which allows applicants to use one basic form for hundreds of colleges" (from Mellissa Korn, "How to fix College Admissions" Wall Street Journal Review, page C2, Nov 30/Dec 1, 2019). Korn (2019, p. C2) notes that users of the Common Application have increased the number of schools to which they apply -"36% of students submitted seven or more applications in 2017, up from 10% in 1995."

The Committee also discussed TOP challenges for Bradley decision making in technical areas such as Math, where these tests needed for the appropriate placement in Math for students.

4. Report From the Contractual Arrangement Committee (see [Attachment 2](#))
5. Report From the University Resources Committee (see [Attachment 3](#))
6. Report From the Intercollegiate Athletic Committee (see [Attachment 4](#))
7. Report From the Committee on International Initiatives ([Attachment 5](#))
8. Report From the Elections Committee

27 April 2020

To: Dr. Ahmad Fakheri, President, University Senate
From: Andrew Kelley, Chair, Senate Elections Committee
Re: Elections Committee Report for the 2019-2020 Academic Year

Committee Members:

Eden Blair
Heather Brammeier
Teresa Drake
Andrew Kelley (Chair)

Dear Dr. Fakheri:

In the 2019-2020 academic year, the Senate Elections Committee conducted the routine elections for various Senate committees. In January, the committee also took part in discussions about the use of the University Assembly, something that never ended up taking place.

Thank you.
-Andrew Kelley

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Sen. Pres Fakheri invited comments and questions.

- Sen. Schweigert asked a question about issue regarding Advising in the Athletics Committee report. The report spoke to inconsistency or inaccuracy. What was the nature of these issues?
- Sen. Tippett: The issues were related to academic advising given to student athletes and these will be monitored. He respectfully asked the announcement included in the report to stay confidential till end of May.

VIII. Old Business

IX. New Business

Motion to Approve a Resolution in Honor of Retired Faculty and Staff

Motion: Sen. O'Brien; 2nd: Sen. Timm

Be it resolved:

Whereas, the individuals named herein are retiring from Bradley University;

Whereas, these individuals have faithfully served the University for a substantial portion of their careers, ranging up to 40 years; and

Whereas, they consistently put the good of the institution and the needs of our students at the forefront of their efforts; and

Whereas, they have been faithful colleagues, standing side by side during times of challenge as well as times of celebration; and

Whereas, we will miss the opportunity to see them on a regular basis on campus; and

Whereas, we wish to thank them with all our hearts;

Let these names be read into the minutes of the 2019-2020 University Senate's final meeting with the thanks of the Senators here gathered acting on behalf of their constituents:

Fran Armmer, Associate Professor in the Department of Nursing

Carolyn Bachler, Administrative Support in Networking & Communication Systems

Jeanne Clayton, Administrative Support in International Studies

Tim Conley, Associate Professor in the Department of English

Marcia Edwards, Administrative Support in Learning Design & Technology

Peggy Flannigan, Associate Dean for Distance Learning and Associate Professor in the Department of Nursing

Jan Frazier, Instructor in Residence in the Department of Communication

Steven Gutschlag, Assistant Professor in the Department of Electrical and Computer Engineering

Dianne Hollister, Reference Librarian at Cullom-Davis Library

Paul Kasambira, Professor of Teacher Education in the Department of Education, Counseling, and Leadership

Herbert Kasube, Associate Professor in the Department of Mathematics

K. Krishnamoorthi, Professor in the Department of Industrial and Manufacturing Engineering and Technology

Janet Lange, Executive Director of Continuing Education and Professional Development

Linda Lowery, Cataloging Associate at Cullom-Davis Library

Nena Peplow, Director of Human Resources

Gary Roberts, Professor in the Department of Entrepreneurship, Technology & Law

Rebecca Snyder, Director of Application Development in Enterprise Systems

Robert Scott, Professor in the Department of Economics

Jenny Tripses, Professor in the Department of Education, Counseling and Leadership

Ali Zohoori, Professor in the Department of Communication

Discussion:

- S. Standifird spoke in approval of this resolution.

Motion carried unanimously.

Motion to Approve a Resolution in Honor of President Roberts

Motion: Sen. O'Brien; 2nd: Sen. Timm

Be it resolved:

WHEREAS, Gary Roberts as a 1970 graduate of Bradley faithfully embraces the history of this august institution and honors that history through his words and actions; and

WHEREAS, Gary Roberts is straight forward, open, with a great sense of humor; and

WHEREAS, Gary Roberts listens carefully to others' points of view, even if diametrically opposed to his, and if you are able to make a better argument, he will change his mind; and

WHEREAS, Gary Roberts is genuinely committed to and loves Bradley faculty and students

WHEREAS, Gary Roberts has consistently shown respect and appreciation for Bradley's students, faculty and staff; and

WHEREAS, Gary Roberts has vigorously established faculty and staff advisory groups to seek additional input and maintained unprecedented accessibility, rapport, and kindred spirit with the Bradley University faculty; and

WHEREAS, Gary Roberts has shown a strong commitment to shared governance, bringing unprecedented transparency, expanding the role of faculty and the Senate in the University's decision making process, and in the BOT meetings; and

WHEREAS, Gary Roberts designed and implemented a new strategic plan; and

WHEREAS, Gary Roberts launched a faculty salary initiative; and

WHEREAS, Gary Roberts completed Phase 1 of the new Business and Engineering Convergence Center; and

WHEREAS, Gary Roberts expanded Bradley's suite of online course offerings; and

WHEREAS, Gary Roberts compelled the increased safety of the Bradley campus and neighborhood; and

WHEREAS, Gary Roberts strengthened Bradley’s outreach to its illustrious alumni; and
WHEREAS, Gary Roberts has been remarkably successful in articulating and exemplifying the
Core Values at the heart of the Bradley Experience, including excellence, leadership,
innovation, globalization, collaborative learning, community, diversity, experiential
learning; entrepreneurship, and service; and
WHEREAS, Gary Roberts efforts have increased trust, respect and partnership between faculty
and staff and the leadership of the University, specially at a time that we all need to
work together to overcome the challenges that we face; and
WHEREAS, Gary Roberts has been adamant that the burden of our financial challenges not fall
on the most vulnerable employees; and
WHEREAS, Gary Roberts, has always been optimistic about Bradley’s future;

Let it therefore be resolved that Gary Roberts be honored by this University Senate herein
gathered with praise and thanks for a legacy of educational excellence, civic and social
responsibility, and for a job well done.

Motion carries.

Sen. Pres. Fakheri shared final comments for his last Senate meeting including thanks to the
Senators, and to his exec board, for the work done to assure and extend shared governance.

X. Adjournment

At 4: 13

DRAFT



Mathew Timm <mtimm@fsmail.bradley.edu>

May Special Meeting of the 2019-2020 University Senate

1 message

Ahmad Fakheri <ahmad@fsmail.bradley.edu>
Cc: Andrew Kelley <akelley@fsmail.bradley.edu>

Tue, May 5, 2020 at 5:16 PM

Dear 2020-2021 LAS Senators,

I would like to take this opportunity to welcome the newly elected senators, and thank the continuing senators for their service to the University. The May special meeting of the 2019-2020 Senate is tomorrow, Wednesday, May 6, right after the 8th Senate meeting that starts at 3:10 p.m. If you don't wish to attend the 8th senate meeting, plan to login no later than 4:15 p.m. The meeting is online and the link is

<https://Bradley.zoom.us/j/95212755743>

The agenda for the meeting is

- I. Call to Order
- II. Election of Senate Officers
- III. Confirmation of Senate Committee Memberships
- IV. Summer Senate Meetings
- V. Adjournment

Thanks,

Ahmad

Ahmad Fakheri, Ph.D., Fellow ASME
Senate President 19-20
Professor and Chair
Department of Mechanical Engineering
Bradley University
Peoria, IL 61625
ahmad@bradley.edu
(309) 677-2719



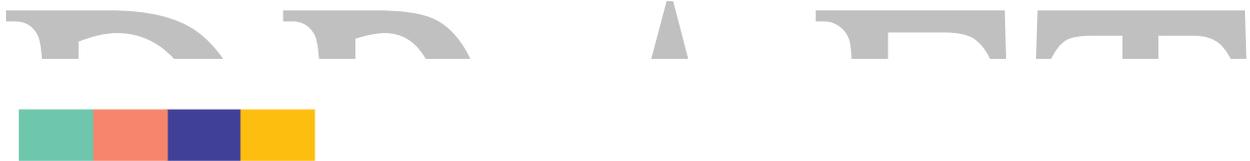
Bradley University Senate

Special Meeting of the 2020-2021 Senate

3:10 p.m. – 5:00 p.m., July 16, 2020

Online

Minutes DRAFT



MISSION:

Bradley University empowers students for immediate and sustained success in their personal and professional endeavors by combining professional preparation, liberal arts and sciences and co-curricular experiences. Alongside our dedication to students, we embrace the generation, application and interpretation of knowledge.

Agenda

I. Call to Order at 3:16

Senate President Matt Timm thanks the tech support team and all committees for their work and announces that there will be a senate meeting on August 20th 3:10 PM – 5 PM. The meeting will have business items, curricular and regulation items (some from last academic year, and some from the new opportunity committee).

II. Reports from Administrators

A. President Stephen Standifird

- Pres. S. Standifird thanks everybody for extraordinary work done by all and appreciates their work effort to keep things going in a positive direction. In past 10 weeks, there have been two major items. One is reduction, the other is return to campus plan.

For Reduction, two big issues have been dominant in conversations, which need attention right away. One is the immediate issue related to COVID19. The other is to quickly understand the challenge and work towards a balanced budget for Bradley University. We are committed to put a strong financial foot. The CFO Jeff will specifically talk about the financial position. Pres. S. Standifird wants to highlight the overall Planning advisory group, Ad Hoc committee group, and other groups have been working on these issues. Bradley needs to navigate the challenge first and financially move in a right direction. The university also needs to preserve the Bradley culture as much as possible.

There were a lot of thoughts on how to make reduction. Permanent and one-time changes have been taken into consideration. We decided to have a voluntary separation program (VSP) first and try to have it as much as possible and open it up widely. In a good way, there was a fair strong participation of VSP. We are able to do less involuntary separation than we anticipated.

In one of the VSP information sessions, I misspoke about “guided by, but not bound by the handbook” and got a strong feedback on that. We were able to go with reduction in the way more in line with the handbook, at least in spirit. Those individuals in those eliminated positions will be able to complete the upcoming academic year. However, their contracts will not be renewed at the completion of the 2020-2021 academic year.

Question: What are details about reduction? (from zoom chat)

Answer: Pres. Standifird: when we talk about specifics about what we have on positions, we would like to have transparency, accountability, and respectfulness. There should be “exit with integrity”. Some individuals in those positions asked for privacy. The board of trustees does not have the detailed information either. What I can share is that every area of the university is impacted. All positions in VSP and involuntary positions present in different areas. There are about 69% personnel in academic

affair. It happened at all levels. VP in marketing took the VSP. Everybody is taking a bite on this. We are not replacing those positions. All of these are designed to treat it as a permant reduction.

B. CFO Jeff Blade: We met the BOT in May. In the past 10 weeks or so, we have been working on putting an operating budget for AY2020-2021, and trying to have milestones to build different scenarios for what happen related to the COVID19 and continue minimizing the deficit gap.

The Chronicle of Higher Education projected that 25% students won't return campus in the Fall. \$40 M deficit is anticipated if 20% revenue decline. The enrollment number of Bradley University has been strong. The number is flat compared with the one from prior year. It is better than we anticipated. We are checking every line of budget and work closely with the enrollment management. We communicated with the BOT in June 2020. To close all deficit, it would include drast changes including reduction in salary and retirement contribution. Instead we have the approval from the BOT to keep the deficit ranging from \$5 M to \$7 M in FY2021 and plan to close the deficit gap in two years. We will continue to look into operational efficiency under the suggestion of consulting company, and find new program opportunity to benefit the university. Efforts are underway right now to identify and approve new programs.

Bradley development have been modest. We are having a comprehensive review with consulting company and working on acclerating Bradley development. We anticipate to balance budget in two years and preserve the long term vitality of the university.

Question: Bill Bailey: What does the cash flow look like?

Answer: CFO Jeff Blade : There were some concerns. In March 2020, the endowment funds were significant hit by the market drop due to the pandemic. Fortunately the market bounced back quickly, which did not trigger the covenant issue with bonds. The budge deficit for fiscal 2020 was \$10 M – \$15 M. Academic institutes have low cash flow during July – August and Dec – Janury. July-August is the time when spending ramps up before the tuition comes in. The enrollment of Bradley has been strong. Pratima did an outstanding job in Spring 2020 to shut down non-essential spending and those spending when students were not around. The saving is higher than anticipation.

Question: Teresa Drake : there is a question from the chat about the Huron report. It was not shared with the faculty community. What are the recommendations? How much saving?

Answer: CFO Jeff Blade: Huron report focus on IT , finance, HR and the market. The work was trunated by the pandemic. They are still in the process of compeleting recommendations. They are asked to finish the work and continue to make more recommendations based on the pandemic impact.

Question: Kris Mailacheruru : what was the breakdown of faculty voluntary separation by college?

Answer: Pres. Standifird: 63 total including 17 faculty.

Question: Kris Mailacheruru: New program opportunities, what are they?

Answer: Pres. Standifird: There is a process to go with it . Walter will address it later.

B. Senior Vice President of Academic Affairs and Provost Walter Zakahi

Provost. Zakahi: The important aspect of our plan is to generate new programs in order to generate revenue. We follow the survive and thrive model. Chris Jones led a group and spent 3 – 4 months in generating a check list for new programs for consideration. It includes three areas: strategic alignment, financial viability and program execution. New programs should demonstrate evidence on all three areas. Degree related programs will be proposed to the senate in the August senate meeting. Curriculum and regulation committee will review them before the the senate meeting.

Pres. Standifird: Chris Jones has done a really good job. Ideas are from everywhere including the ad-hoc committee.

Chris Jones: There are 400 students left with a few credit hours away from degree completion. An online pathway to complete bachelor degree in general study could be offered. Other ideas were discussed such as : transformative education opportunity: establish Lydia Moss center, new tuition price model, double down with the relation with OSF etc. For moving forward programs, there is a proposal process. Talk with the Dean of your college. Those programs could be online Bradley grown program, continue education, certificate program and etc. President and CFO will review them before they are sent to the curriculum and regulation committee.

Question: Burl George: Do we have a breakdown on those did not get degree?

Answer: Pres. Standifird: We don't have the breakdown data. There are some good ideas in the white paper from the ad-hoc committee such as financial transparency , more accountable accounting system, and inclusive excellence. Jeff and I love the idea of inclusive excellence. Our finance is messy. It is an understatement. We are really aggressive to get the financial data cleaned up. We don't release them until we get confident that the data is accurate. Resource will be allocated to the new programs. I can see it could be a concern. All of these are still in the early process. Through quick win programs and advancement, we should be able to grow the pie, instead of taking away resources. It's not a zero-sum game.

Question: Matt Timm: (read from the zoom chat): Is there any possibility of involuntary separation in the AY2020-2021?

Answer: Pres. Standifird: we have done what we need to do. It is not our intention to have involuntary separation. we will look for efficiency.

Question: Daniel Glassmeyer: Can you clarify that the 12 people who were decided to cut from Bradley family not because of COVID, but because of long term structural deficit?

Answer: Pres. Standifird: It is a little of both.

Question: Kristi McQuade: We don't fully understand the \$10M deficit at the first place. We have lost valuable colleagues. The teaching load has been increased. What's the plan for next year?

Answer: Provost. Zakahi: We suspended expenditure in adjunct positions. faculty load will be returned to the way we have been. We will quickly get back to staff in appropriate areas based on enrolled students. It may not be as fast as we expect. We won't get back to the same position. Need demonstrate real need for part time positions.

Pres. Standifird: The ad hoc committee has documented these nicely. The financial data has been messy. Thanks for CFO Jeff's team and the data analysis from the ad hoc committee. We need to pay attention to financial discipline. We should not all the sudden find out we are in the

same position again. There are a lot of inefficiency in the process. We are thoughtfully tacking about this.

Question: Jeanie Bukowski: There are two questions from the chat:

- (1) The Handbook states on p. 109 that, “The overriding consideration in preparing and recommending a plan for responding to a state of financial exigency shall be the preservation of Bradley University as a viable institution of higher learning without impairment of the academic standing of the University.” Can you make an argument that terminating faculty will not impair the academic standing of the university?
- (2) What’s the cause of structural deficit and financial problem? According to the URC report, it was not caused by instructional cost.

Answer: Pres. Standifird: I don’t think the data is clean enough to tell that instructional cost caused or not caused the structural deficit. We should be cautious to suggest instructional or non-instructional. I think it is every where. Initially we thought this way. We talked with VPs. There were some cut in past years. Certain area was dangerously lean. **CFO Jeff Blade:** It is cross enterprise. Budgeting process is not strong. We need to increase transparency. It does not guide. There are a lot of sloppiness and it lacks of accountability.

Question: Matt Timm: What about athletic programs? There have been a lot of questions on them.

Answer: Pres. Standifird: no body is immune. They are impacted as well.

III. **Report from the Ad Hoc Senate Committee (formed at the May Senate Meeting)**

Jeanie Bukowski (Ad-hoc Committee Chair): We already have talked about some items and will leave some time for discussion.

Please see the attached files:

Summary document – Ad-Hoc report to Senate

- (1) Senate ad hoc committee message to the BOT and leadership (5/15/2020)**
- (2) White Paper (revised Appendix 2 with information from the graduate school)**
- (3) Statement on Bradley Student Engagement**
- (4) Senate Recommendations**

The charge of this committee is to identify practical cost savings, revenue enhancements, and other financial opportunities which will lead to short- and long-term success consistent with Bradley’s core values and academic mission. The committee was formed to have a faculty voice in the rapidly-moving discussions, drawing on expertise from the URC and other Senate Standing Committees.

The Committee’s output includes a White Paper entitled “Strategies for Overcoming Short-Term Challenges and Thriving into the Future” and a statement on student engagement. We also note forward movement on two of the Committee’s recommendations, a Lydia Moss Bradley Center for Transformational Education and a working group to examine tuition/pricing. The Committee’s response to the announcement on July 8 of the elimination of 12 non-tenured faculty and staff positions was read:

We understand the challenges presented by the structural deficit and Covid-19. However, given our data-based recommendation that cuts to the instructional core run the risk of hampering Bradley’s longer-term success, we are very troubled by these involuntary separations. The potential negative impacts of these cuts are exacerbated by a lack of clarity regarding the basis on which the 12 positions were selected. We reiterate our strong caution that cuts to the instructional core undermine Bradley’s ability to succeed.

The Committee appreciates the President’s comments on preserving Bradley’s culture, but notes that these cuts also have the potential to harm our market position. One of the guiding principles in our work

is that short-term decisions must not undercut our ability to succeed in the longer term, and we demonstrate in the White Paper the risk involved in making further cuts to the instructional core.

We also maintain that short- and long-term decision making must be informed and supported by high-quality data and strategic analysis, and aligned with Bradley's core identity and mission. It is also crucially important to establish a culture of trust and accountability—based on transparency in decision-making and clarity in communication at all levels, from the Board of Trustees on down.

There are four sections in the White Paper. The first is an analysis of our current financial situation, examining how we got to this point, with the goal of remedying the problems that led to this situation. We note that while Covid-19 must now be considered in Bradley's plan for recovery, our current financial problems are not due to the pandemic. Rather, there are a variety of factors and decisions resulting in losses starting in 2016, which the URC was able to determine through analysis of Bradley's public audited financial statements. A comparison with Butler is instructive here (Table 1 in the White Paper), and shows Bradley with lower net tuition, contributions, and operating income, higher administration and general expenses, and lower instructional, and academic and student support spending. We note that Butler is also transparent in providing a clear line item for the Athletics budget. We recommend that BU implement a contemporary, transparent budget process that sets benchmarks and drives accountability across all units in the University.

The second section of the White Paper analyzes what the Committee sees as the basis for Bradley's excellence: our stated vision to be the leader in student engagement. Bradley's niche in the market is to relentlessly deliver a transformational learning experience. In order to pursue this vision effectively, the Committee recommends action by the BU Strategic Planning Committee, and enhanced engagement between the Senate Executive Committee, member of the higher Administration, and the Board of Trustees.

The third section provides an analysis of the instructional core as necessary for high-quality student engagement. Classroom instruction is the profit center for universities, and instruction costs do not appear to contribute to Bradley's structural deficit. A key focus of immediate-term decision making has involved improving faculty operating margins by increasing teaching loads, reducing benefits, and terminating positions through voluntary and involuntary separations. Even before the involuntary separations, IPEDs data reflected a 15:1 student-to-faculty ratio, compared to all the top 10 schools in the *US News and World Reports* rankings of Midwest regional institutions of 12:1 or lower. This is a risky strategy given our point of distinction in the higher-education marketplace, in that such cuts undermine our ability to deliver on our demonstrated commitment to student engagement and high-quality classroom instruction. Based on the limited financial data to which the Committee had access, we identified anticipated savings from the cuts to the instructional core already made for AY2020-21 (approximately \$8 million); identified additional cost-saving measures for the shorter-term (\$5-10 million); and presented ideas for longer-term strategic initiatives in line with our vision (with the potential for an estimated \$11 million in new revenues). The goal is to provide *alternatives* to further cuts to the instructional core.

The fourth section expresses concern with the stated strategy of "accessible excellence," given that market research shows that "accessible" usually means "affordable," or "bargain". The White Paper analysis demonstrates that BU cannot compete on the basis of price. The Committee thus recommends that we shift the focus to "inclusive excellence", building a market strategy that differentiates Bradley as a high-quality comprehensive university, building on our core strengths and vision, while at the same time strengthening our commitment to diversity, inclusion, and equity.

The Ad Hoc Committee also provides several specific recommendations for Senate action, through the BUSPC, the URC, Curriculum and Regulations, and the Tenure, Promotion and Dismissal Committee.

Question: Graduate Dean Jeff Bakken: I am disappointed about some inaccurate or missing information. The graduate school should be a part of process and could supply more input.

Answer: Ad-hoc Committee representatives: Jeanie Bukowski, Brad Andersh, Jackie Hogan: The recommendations re: the Graduate School contained in Appendix 2 drew from campus discussions and reports that have been around for some time. Given the charge of the Ad Hoc Committee to identify cost savings, the rapidity with which decisions on cuts were being made, and the fact that we did not have specific amounts in terms of alternative cost savings that would be necessary to avoid cuts to the instructional core, we tried to put as many options on the table as possible. The Committee's recommendations centered on providing analysis of how current Graduate School functions could be devolved *if* a decision were made to eliminate the Graduate School. It did not recommend elimination of graduate programs, and also noted the importance of the Office of International Student and Scholar Services, referencing the Senate Standing Committee on International Initiatives report. We apologize for any errors or omissions.

Note: On July 17 2020, the Ad Hoc Committee submitted a revised version of the White Paper that contains modifications in Appendix 2. It includes corrected information regarding Graduate School functions, pursuant to the concerns raised in the Senate meeting by Dean Bakken, and using information provided by Rachel Webb. Specifically, the modified section, including a *Note* stating that corrections were made, appears on pp. 17-18 of the White Paper document. The rest of the document remains unchanged.

Question: Danielle Glassmeyer: Thanks for the hard work of Ad Hoc. Rather than long term, inclusive excellence perhaps we should also think short term. The digital divide is real. We should ensure students are well supported in terms of digital education. There is a concern that students may have to figure out which class will be on Sakai or Canvas, online or face-to-face, Tuesday or Thursday. We should make a judgement call to simplify this potential schedule madness.

Answer: CIO Zack Gorman: We are working on a plan to have Sakai linked to Canvas, and increase bandwidth. We will meet the goal in next couple of weeks. VP Student Affairs Nathan Thomas's team is also working to ensure residential halls are up to the speed.

Pres. Standifird: It is a wicked, complex problem. There is no good answer. We try to make it as simple for students as possible. There are a lot of good suggestions in the Ad hoc report. Jeff and I are totally energized by inclusive excellence and transformational learning.

Question: Jeanie Bukowski: There are questions from the Zoom chat:

What role is Bradley Athletics playing in helping us to be more financially disciplined? The faculty are under the impression that the academic core is absorbing the majority of these cuts. Can you offer evidence that other units are also being asked to run lean operations? There has never been review on Athletic number. The information has never been forthcoming.

Answer: Pres. Standifird: I cannot image why this is not shared. It is tough to get clean data. We have to feel confident on the data and have them as clean as it needs to be. We are way below compared with other universities. Athletic programs are underfunded as everybody else.

CFO Jeff Blade: Every single area has an issue with the budget, in terms of what they are asked to do vs. what was given.

Question: Megan Rimmel: There are 6 faculty members in the involuntary separation program. 4 out of 6 are female. What are we going to say in the next gender equity report?

Answer: Pres. Standifird: We pay attention not to undermine our excellent education. We are thoughtful about keep the coverage we need. The gender equality, the number of 1st generation students, the diversity of student and faculty population are no better than our peers. It is something very much on my radar screen. It is my priority to continue to grow the organization with inclusive excellent environment. **Provost. Zakahi:** Way back to Spring 2020, college deans are asked to make recommendations about positions. Deans worried the names got out at the very preliminary level. We were not looking names. There is a gender difference. At the end of day, there was a gap.

Question: Megan Rimmel: what would be the steps to eliminate positions?

Answer: Provost. Zakahi: Back to the spring, we were looking at much deeper deficits, and asked the deans for budget reduction plans. We looked at the VSA on faculty. It is seldom strategic. The programs with high demands are heavy hit by the VSA process. Then we looked at programs with lower ranking in terms of program prioritization early in the year, and asked Deans for potential cut, without respect to tenure. All were included. We looked through those for what we could do in nontenured positions. It won't reach the target. Had a few follow-up conversations with Deans. I will not eliminate the positions without conversations with deans.

Question: Naomi Stover : our department (biology) lost the lab coordinator position. It is important to teach and support our labs. We have the highest student credit hours. Was it a part of consideration?

Answer: Provost. Zakahi: I was talking about faculty cut. For the staff cut, there was a different calculation. We make reductions with less impact on faculty positions. It is not necessary following the program prioritization data.

Question: Danielle Glassmeyer: What's the handbook language of eliminating position?

Answer: Provost. Zakahi: I use the termination of non-tenured faculty on page 105 of the handbook (version: Dec 15 2018).

Question: Ahmad Fakheri: The ad hoc committee proposed many long-term and short-term ideas. Is there any serious effort in looking into those recommendations to put the house in a financial order?

Answer: Pres. Standifird: The finance is messy. The estimated financial numbers may not be as much as shown in the white paper. The ad-hoc committee did their best given the data. Take the report and use it as a tool. Jeff (the financial team) and the white paper are pointing to the same direction on some recommendations. Even numbers may not great as half of those suggested. It is still worthy to do that. I am counting on some great work out of these.

Question: Danielle Glassmeyer: I am still confused by the language handbook (page 105) on non-tenured faculty. Which one of three are the governing principle? They are cause, financial exigency, and eliminate of the program.

Answer: Provost. Zakahi: I am not prepared to answer that.

Question: Tim Koeltzow: why so many bad decisions have been made? we are those who face the consequence of those decisions. How would you like the ad hoc committee going forward?

Answer: Pres. Standifird: The finance is messy. We are still learning the process for systematic data. I would like to meet the group again. We have the emergency advisory committee and meet biweekly. If the ad hoc committee wants to talk, let's continue the conversation.

Question: Fred Tayyari: IMET lost 3 faculty through cost control or faculty reduction. There are some courses which can only be taught by two faculty members. Without proper expertise, we will have

unhappy customers, which creates more damage. We are not looking for course reduction. Needed faculty expertise must be there.

Answer: Provost. Zakahi: I appreciate your response. Departures are not strategic. The president and I discussed about some requests of additional positions this morning, to make sure we hire positions in the area we need to.

Question: Bill Bailey: will program prioritization continue in next academic year? What's the financial side of AY2019-2020?

Answer: CFO Jeff Blade: We will have the financials around mid-August. **Provost. Zakahi:** We will reform and change the criteria of program prioritization. I cannot give a complete answer.

Question: Matt Timm: In the chat, there are some questions on return to campus. Various senators also suggested on sharing the information what we have, even it is a preliminary plan, and questions on how to handle the situation of student not wearing a mask in the classroom.

Answer: Provost. Zakahi: we will send out an email to faculty and staff. In conversation with deans and chairs, we allow faculty to come back with full teaching and requesting one course online. More information will be in next email of return to work and class function.

If you are approved for on-line, others are face-to-face. If there is issue through HR, teach online. We understand we give students as much face-to-face as possible. Hope face-to-face every day (in theory). Strategic alternating students for courses which exceed covid-19 capacity. Give a stop-clock option for tenure-track faculty. **Pres. Standifird:** there are a series of decisions. we make the best decision as we can , given the data we have. We care about the healthy well-being of faculty, staff and students. We back to campus, following the science. These include mask required, surveillance testing, contact tracing, placing in student housing for quarantine, and be consistent with CDC guideline based on what we know today. We will have whole marketing campaign with what the expectations are and be aggressive to follow the expectations. We will constantly communicate this information.

IV. Adjournment (at 5:31 PM)

Appendix List:

Summary Document – Ad Hoc Report to Senate (July 10 2020)

- 1. Senate Ad- Hoc committee message to the Board of Trustees and Bradley Leadership**
- 2. White Paper**
- 3. Bradley Student Engagement**
- 4. Senate Recommendations**

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