President's Spring Update

Dr. Bashar Hanna

Monday, February 24, 2020

Overview

- Institutional Goals
- Enrollment and Retention
- Budget Update
- Employee Satisfaction and Engagement Surveys
- Personnel Updates
- Other Updates

2019-2020 Institutional Goals

1. Student Success

2. Leverage Strengths

3. Ensure Fiscal Stability

2019 – 2020 Institutional Goals

Student Success

- Achieving targeted enrollment goals
  - Maintain first-time, full-time student enrollment of 2,000 students for the Class of 2024.

  - Increase graduate enrollment by 3 – 5%, compared to the Fall 2019 graduate enrollment of 697 students (718 – 732).

  - Increase new transfer student enrollment by 8 – 10%, compared to the Fall 2019 transfer enrollment of 367 students (397 – 404).

  - Increase Fall 2020 yield for first-time, full-time students by 1% comparable to the Fall 2019 yield of 29.2% (30.2%).

2019 – 2020 Institutional Goals

Student Success

- Improve Student Retention
  - Increase first-to-second year student retention by 1-2% in Fall of 2020, compared to the Fall 2019 retention rate of 74%.

- Decrease D, F, and W (DFW)
  - Reduce by 5% the students receiving DFW's in high DFW courses.

- Assess Student Affairs
  - Conduct a comprehensive review and assessment of the current Student Affairs division.

2019 – 2020 Institutional Goals

Student Success

- Improve advising procedures by college and department.
  - Increase NSSE scores in the area of "Quality of Interactions with Academic Advisors" equal to or above the PASSHE institutional average for 2019.(BU Seniors - Mean 5.0/PASSHE Seniors - Mean 5.3)
- Fraternity and Sorority Life
  - Complete overhaul from Greek Affairs to Fraternity and Sorority Life.
- Develop college-level retention plans with adoption by June 2020.
- Expand student co-curricular experiences by 5%.
- Expand student civic and service-learning opportunities by 5%.

2019 – 2020 Institutional Goals

Leverage Strengths

- Strategic Planning
  - Lead a comprehensive strategic planning process to align all goals and objectives within the institution. Adoption of framework and strategic goals by June 2020.

- Campus Climate Diversity and Inclusion Survey
  - Begin implementation of Diversity and Inclusion recommendations that emerged from the Campus Climate Survey for Diversity and Inclusion.

- Brand
  - By June 30, 2020, complete Phase II of brand implementation.
  - Complete Phase I of University website redesign.

2019 – 2020 Institutional Goals

Leverage Strengths

- Regional Economic Partnership Opportunities
  - Leverage the Economic Roundtable Working Group to create symbiotic opportunities for the University, the Town of Bloomsburg, and the region.

- Employee Onboarding
  - Create and begin implementation of a comprehensive onboarding program for all new employees.

2019 – 2020 Institutional Goals

Leverage Strengths

- Professional Development
  - Provide professional development opportunities for faculty and staff so that they may excel for the benefit of our students and their success.

- Hire new AVP for Human Resources and Employee Development.

- Cooperate, collaborate and (where possible) lead and advance the State System redesign.

2019 – 2020 Institutional Goals

Ensure Fiscal Stability

- Incentive-Based Budgeting
  - Implement incentive-based budgeting at the department level linked to: enrollment, retention, graduation rates, faculty/student scholarly collaboration, and faculty/student ratio.

- Increase On-Campus Housing Occupancy
  - Increase on-campus housing occupancy by 1-3% (86 – 88%).

- Increase Gifts and Pledges
  - Increase annual gifts and pledges by 10% while increasing immediate use dollars by $100,000 ($1.9M).

2019 – 2020 Institutional Goals

Ensure Fiscal Stability

- Fiscal Responsibility
  - Ensure fiscal responsibility in all areas.

- Financial Sustainability Metric Ratios
  - Maintain financial sustainability metric ratios: Primary Reserve Ratio, Operating Margin Ratio, Viability Ratio, and Alternate Revenue Stream.

- Right-Sizing
  - Right size every unit at the University to effectively and efficiently meet current enrollment needs.
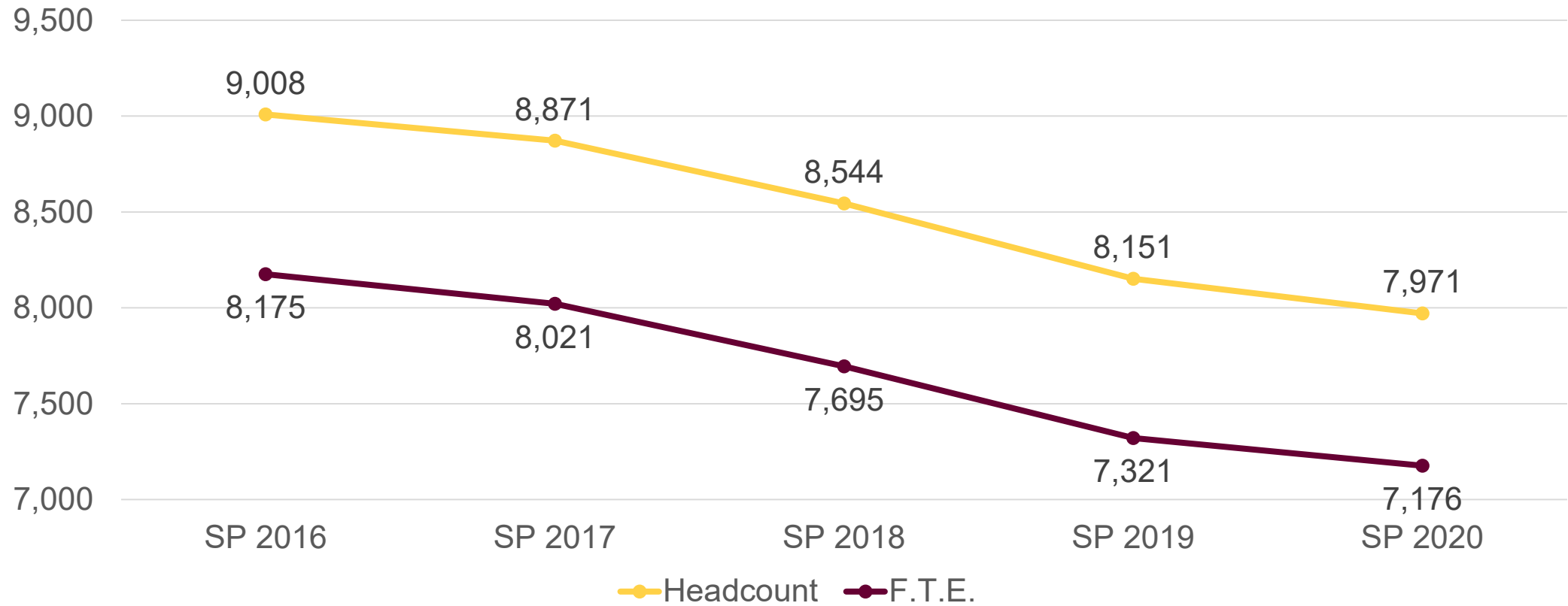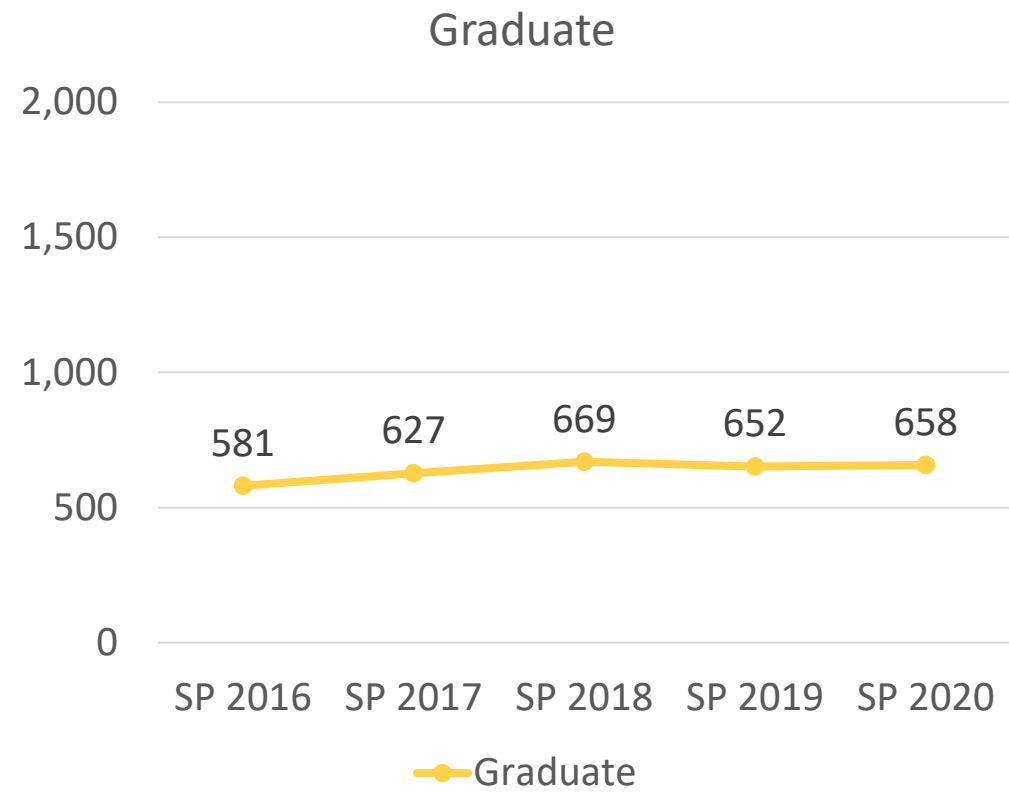
Enrollment and Retention

Headcount Enrollment vs. FTE Enrollment

Headcount Enrollment By Level

Undergraduate

- SP 2016: 8,427
- SP 2017: 8,244
- SP 2018: 7,875
- SP 2019: 7,499
- SP 2020: 7,313

Graduate

- SP 2016: 581
- SP 2017: 627
- SP 2018: 669
- SP 2019: 652
- SP 2020: 658

Bloomsburg University 2020

Undergraduate Headcount By Residency

Bloomsburg University 2020
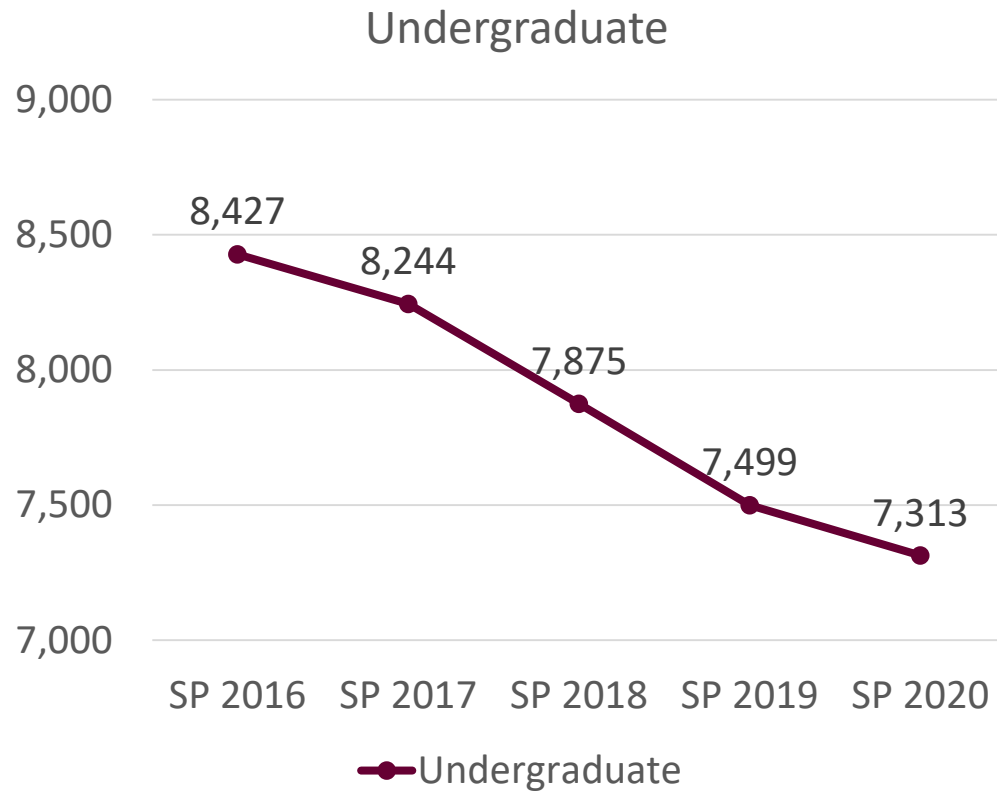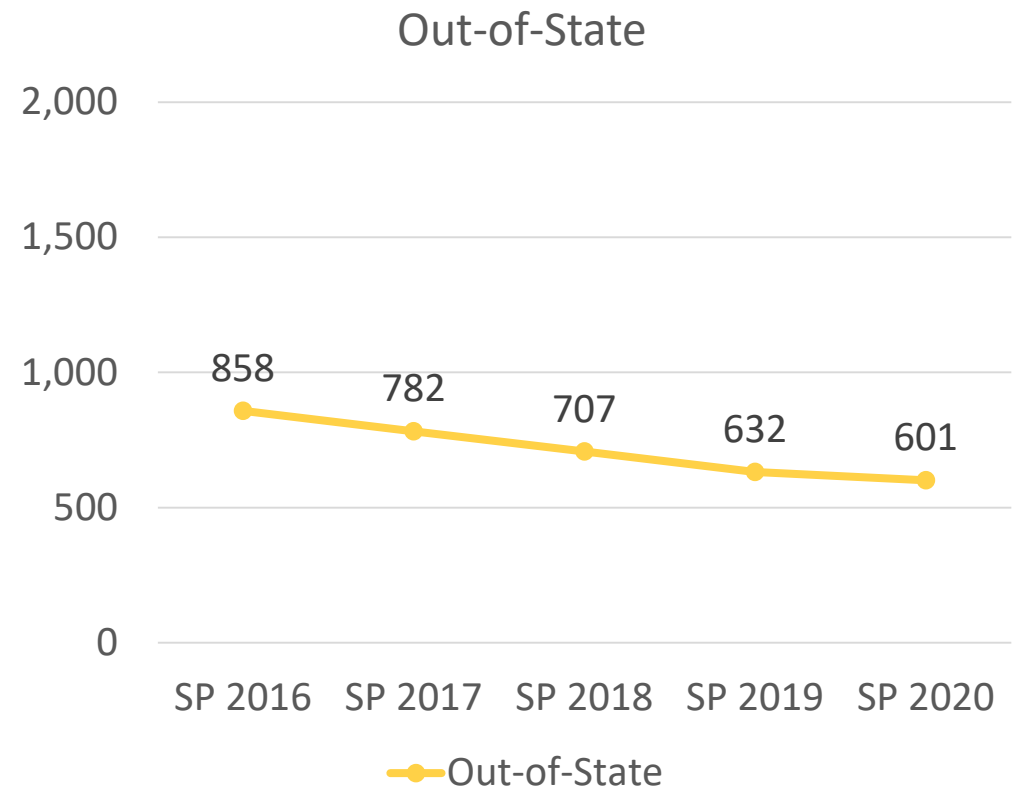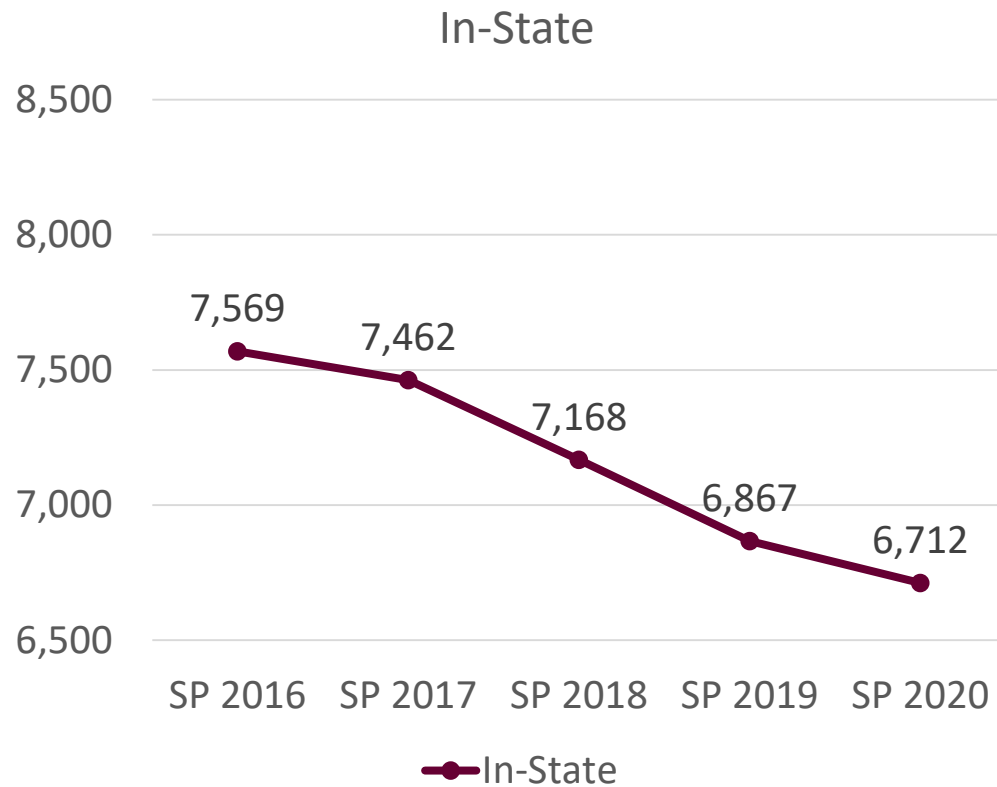
Graduate Headcount By Residency
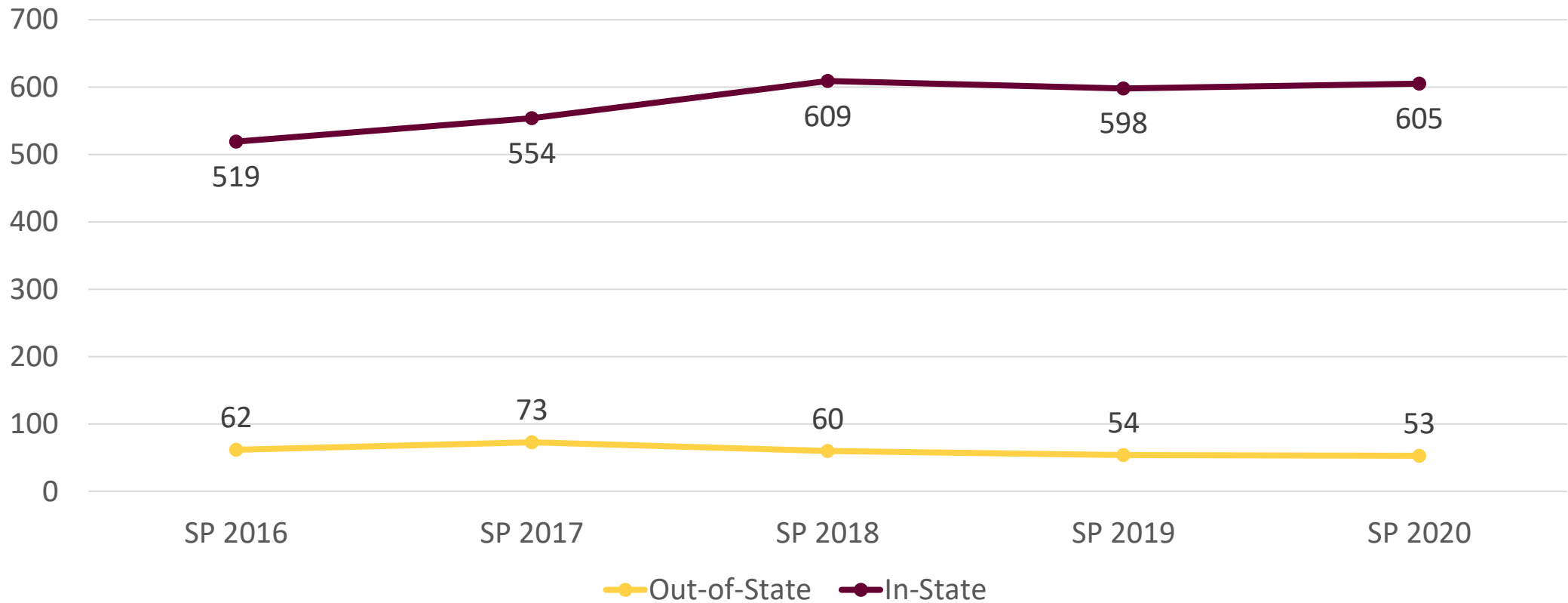
First-to-Second Term Persistence Rates

% Returning Spring Term

— % Returning Spring Term

First-to-Second Term Persistence Rates

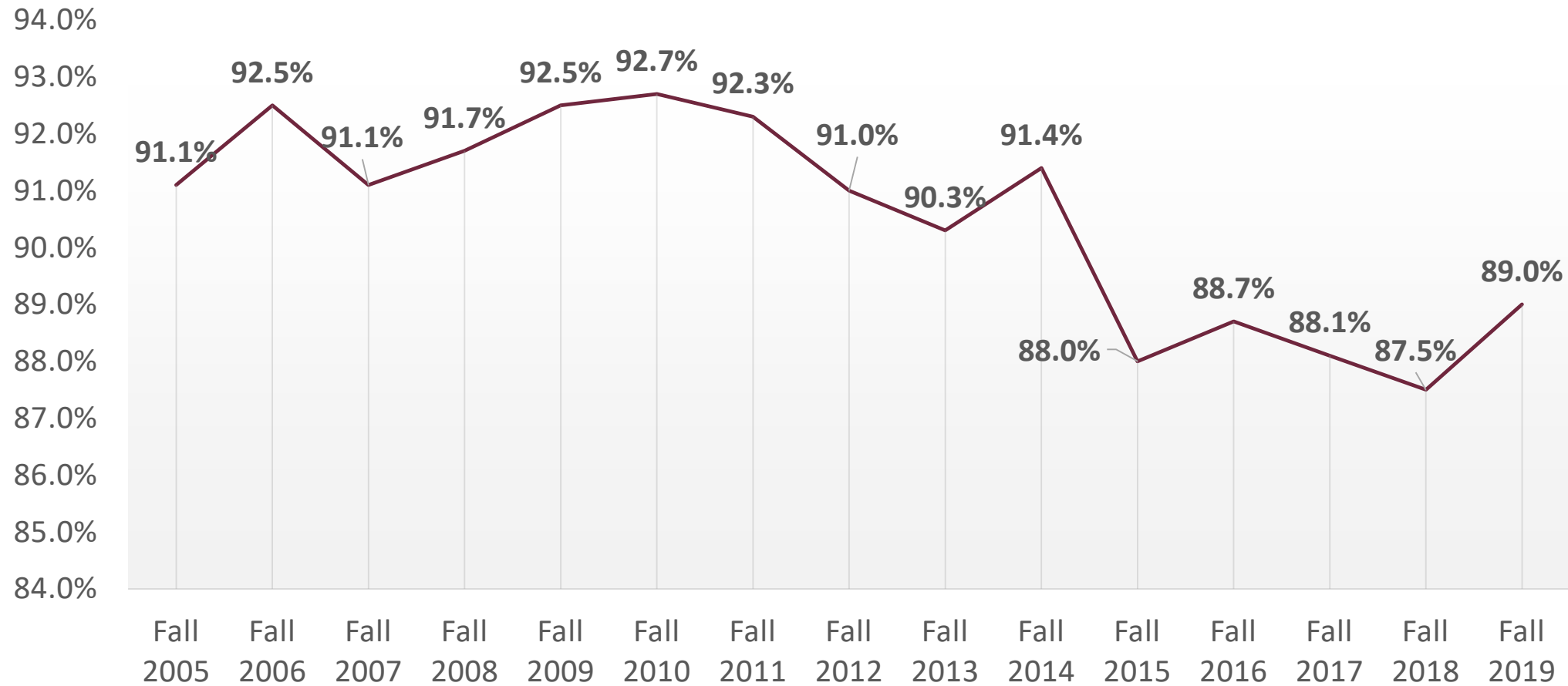| Cohort Year	All Freshmen		Fall Freshmen		Summer Start		Gap Between Summer and Fall
	Cohort Size	% Returning Spring Term	Cohort Size	% Returning Spring Term	Cohort Size	% Returning Spring Term	
Fall 2013	2208	90.3%	1577	92.71%	631	84.15%	-8.56%
Fall 2014	2162	91.4%	1571	92.81%	591	87.48%	-5.33%
Fall 2015	2102	88.0%	1545	90.49%	557	81.15%	-9.34%
Fall 2016	1895	88.7%	1450	89.72%	445	85.39%	-4.33%
Fall 2017	1852	88.1%	1597	89.04%	255	81.96%	-7.08%
Fall 2018	1843	87.5%	1634	88.74%	209	77.99%	-10.75%
Fall 2019	1979	89.0%	1648	90.41%	331	82.18%	-8.23%

Office of Institutional Effectiveness (2/20/2020)

Fall 2018 Headcount Enrollment
Top 10 Counties
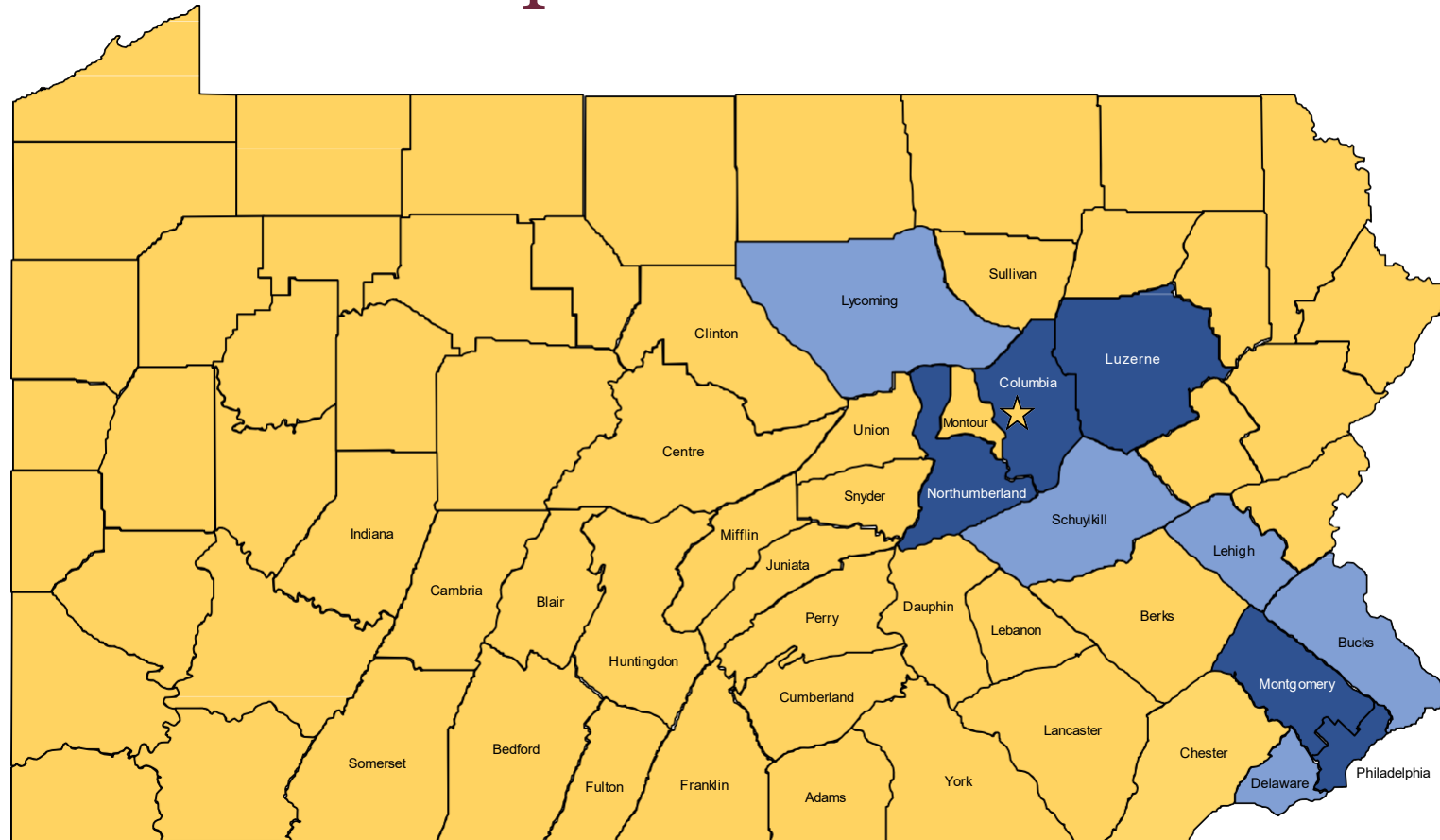
Top 5 counties: 35% of students
Counties 6–10: 19% of students

Top 10 counties: 54% of students

Source: student submission, preliminary end of 15th day data

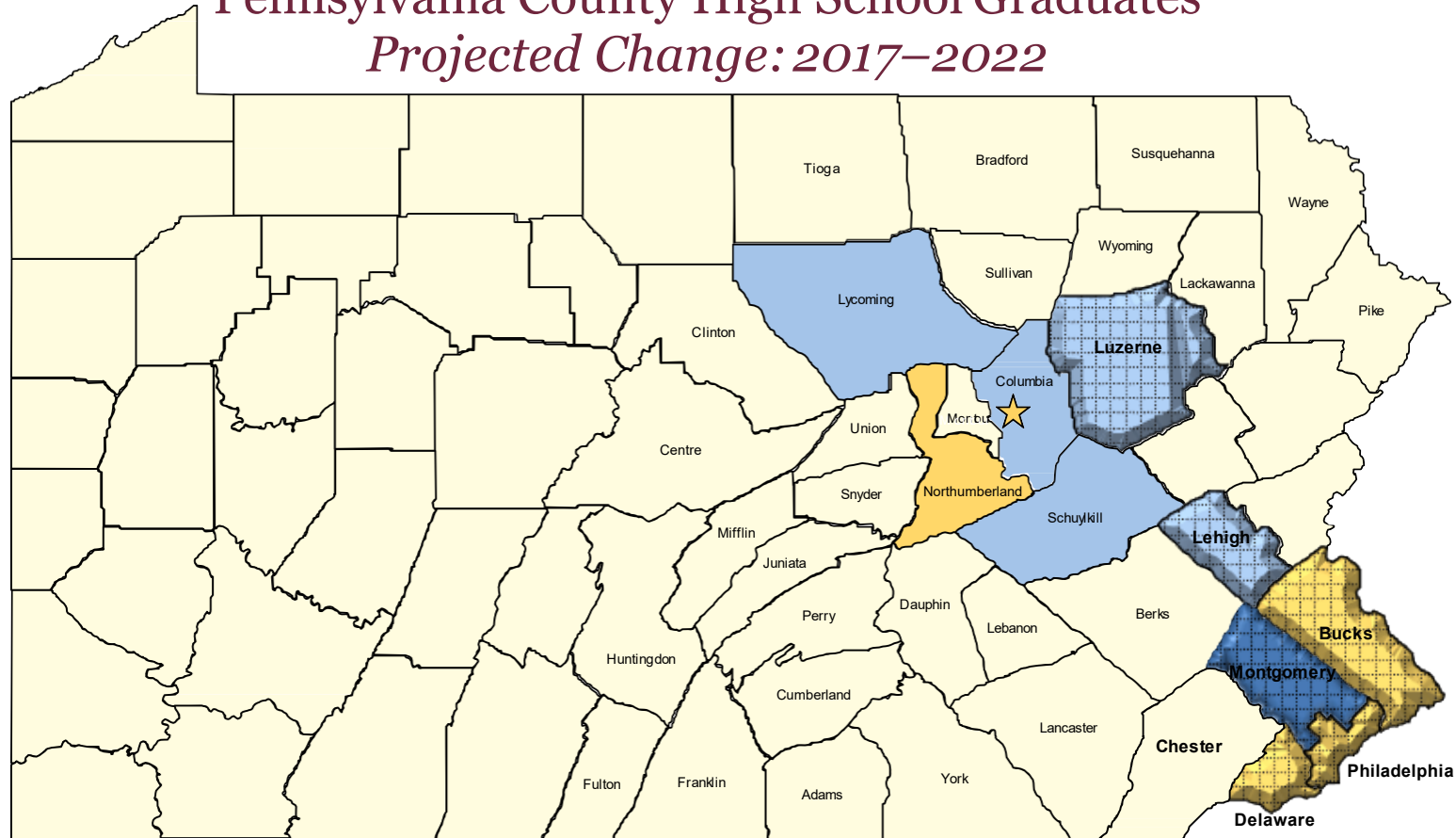# Fall 2018 Headcount Enrollment
Top 10 Counties: 54% of Students
Top 15 Counties for Number of High School Graduates 2016/17 (cross-hatched)
Pennsylvania County High School Graduates
Projected Change: 2017–2022

Percentage Change

More than -20%	-10% to -20%	0% to -10%	0% to 10%	10% to 20%	20% or more
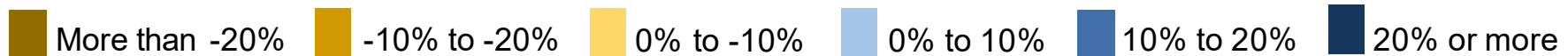
Undergraduate Fall Admissions Summary
Fall Freshmen (as of 2/17/2020)

Fall Freshmen	Goals	2016	2017	2018	2019	2020	#Change	%Change
Applicants	10,500	9504	10161	9,685	9,230	8,116	-1114	-12.1%
Complete Apps	9,000	8,169	8,353	7,742	7,190	6,495	-695	-9.7%
Complete Rate	85%	85.95%	82.21%	79.94%	77.90%	80.03%	2.13	
Total Offers	7,200	6242	6075	5825	5781	5505	-276	-4.8%
Total Deposits	2,150	627	564	629	625	609	-16	-2.6%
Net Deposits	2,065	626	562	628	624	607	-17	-2.7%
Total Melt Rate		0.16%	0.35%	0.16%	0.16%	0.33%	0.17	
Total Yield	28.68%	10.03%	9.25%	10.78%	10.79%	11.03%	0.23	
Total Admit Rate	80.00%	76.41%	72.73%	75.24%	80.40%	84.76%	4.35	

Undergraduate Fall Admissions Summary Transfers (as of 2/17/2020)

Transfers	Goals	2016	2017	2018	2019	2020	#Change	%Change
Total Applicants	1350	644	655	673	457	510	53	11.6%
Complete Apps	959	275	307	316	221	287	66	29.9%
Complete Rate	71.00%	42.70%	46.87%	46.95%	48.36%	56.27%	7.92	
Admit Offers	815	206	210	177	171	221	50	29.2%
Admit Rate	85.00%	74.9%	68.4%	56.0%	77.4%	77.0%	-0.37	
Total Deposits	601	48	46	46	37	69	32	86.5%
Net Deposits	544	48	46	46	37	69	32	86.5%
Yield	66.70%	23.30%	21.90%	25.99%	21.64%	31.22%	9.58	

Financial Reality for BU Students (In-State)

Grant & Cost changes over the past 10 years

Cost: 14,798 — 15,546 — 16,498 — 17,042 — 17,630 — 18,282 — 19,006 — 20,266 — 21,130 — 21,844

PELL: 5,350 — 5,550 — 5,550 — 5,550 — 5,645 — 5,730 — 5,775 — 5,815 — 5,920 — 6,095

PHEAA: 3,507 — 3,014 — 3,700 — 3,238 — 3,574 — 3,414 — 3,692 — 3,726 — 3,342 — 3,508

Years: 2009-10, 2010-11, 2011-12, 2012-13, 2013-14, 2014-15, 2015-16, 2016-17, 2017-18, 2018-19
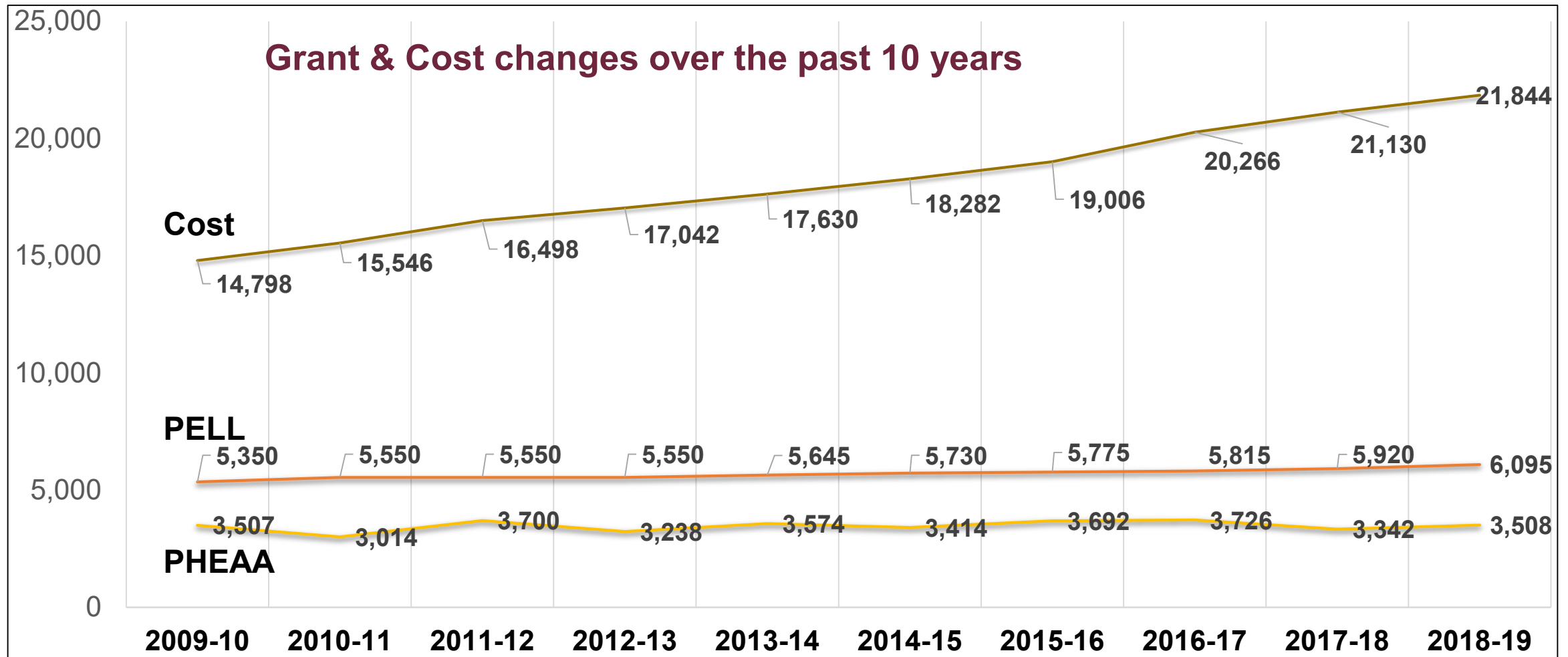
Financial Gap for BU Students (In-State)

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Pell	5,350	5,550	5,550	5,550	5,645	5,730	5,775	5,815	5,920	6,095
Pheaa	3,507	3,014	3,700	3,238	3,574	3,414	3,692	3,726	3,342	3,508
Loans	5,500	5,500	5,500	5,500	5,500	5,500	5,500	5,500	5,500	5,500
Total Aid	14,357	14,064	14,750	14,288	14,719	14,644	14,967	15,041	14,762	15,103
Cost	(14,798)	(15,546)	(16,498)	(17,042)	(17,630)	(18,282)	(19,006)	(20,266)	(21,130)	(21,844)
Balance	(441)	(1482)	(1748)	(2754)	(2911)	(3638)	(4039)	(5225)	(6368)	(6741)

Budget Update

1. FY 2019-20 E&G Budget Update

2. Employee to Student Ratio

# FY 2019-20 E&G Budget Update (General Fund)
(of 1/31/20)

Original E&G General Fund Projected Deficit -9/4/19; Planned Use of Inst Res (BUDRPT21 submission)	**$(5,149,179)**
Changes from Original Projection:	
FY 2019-20 Tuition Revenue Shortfall	(853,974)
FY 2019-20 Fee Revenue Shortfall (Student Success, Registration fees)	(75,292)
FY 2019-20 Interest Income Lower than Originally Projected	(75,000)
FY 2019-20 Salary and Benefits Net Savings Above Original Projection **(original projection = $6.0MM; mid-year revised projection = $6.6MM)** [1]	640,110
FY 2019-20 President/VP/Dean Controlled Operating Expenses Below Original Projection (based on historical spending patterns)	953,085
FY 2019-20 Other Operating Expenses Below Original Projection (other operating expense budgets include: utilities, student information system (MyHusky), telecom, lifecycle replacement-equipment and computers, president's discretionary, etc.) (based on historical spending patterns)	692,720
Revised E&G General Fund Projected Deficit-1/31/20	($3,867,530)

Projected Deficits – 2021 and 2022

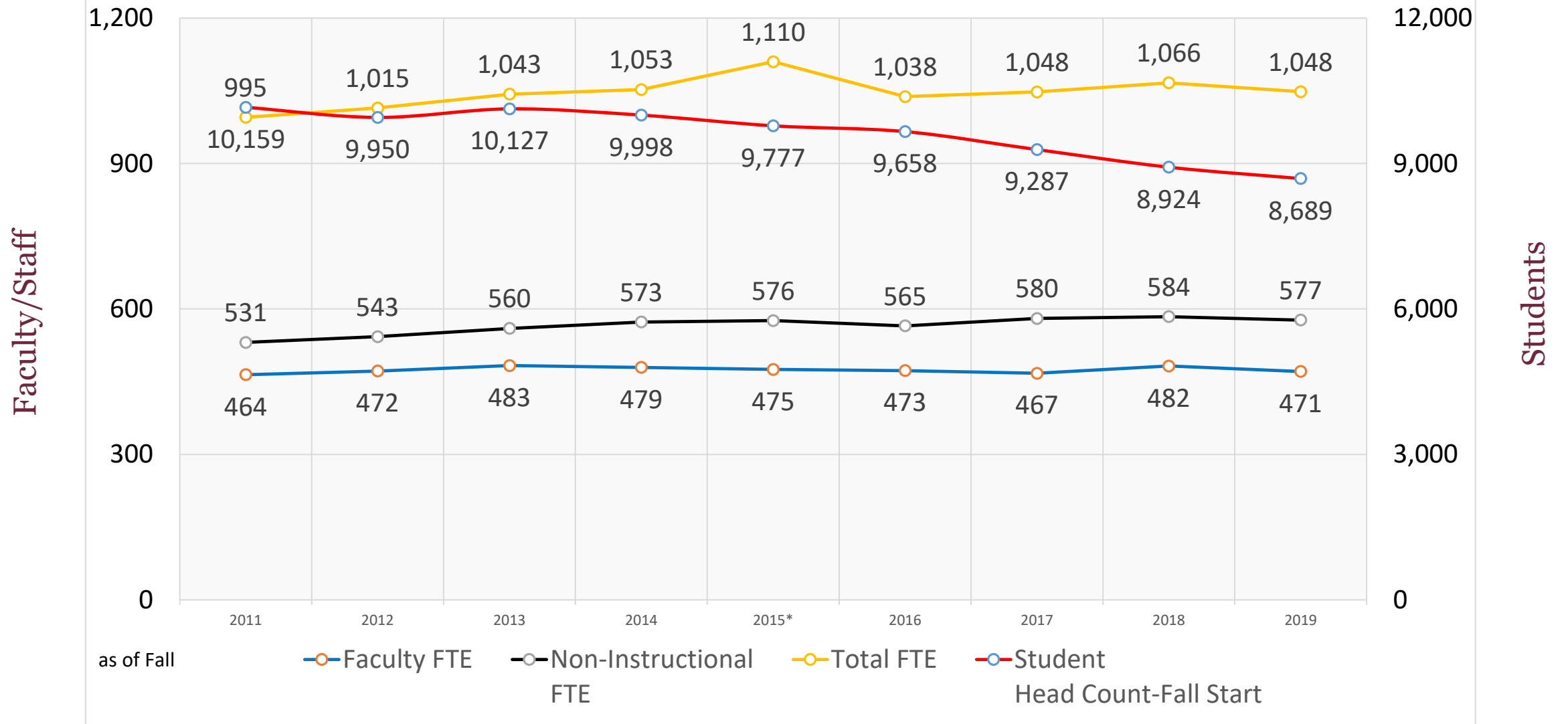|	2020/21				2021/22		
	E&G General	E&G Special Pgms/Self-Supporting	Total E&G		E&G General	E&G Special Pgms/Self-Supporting	Total E&G
Projected Deficit	$ (7,595,963)	$ 7,602	$ (7,588,361)	Projected Deficit	$ (7,959,997)	$ (54,265)	$ (8,014,262)

Student FTE to Faculty/Staff FTE
All Funds - FY 2011 - 2019
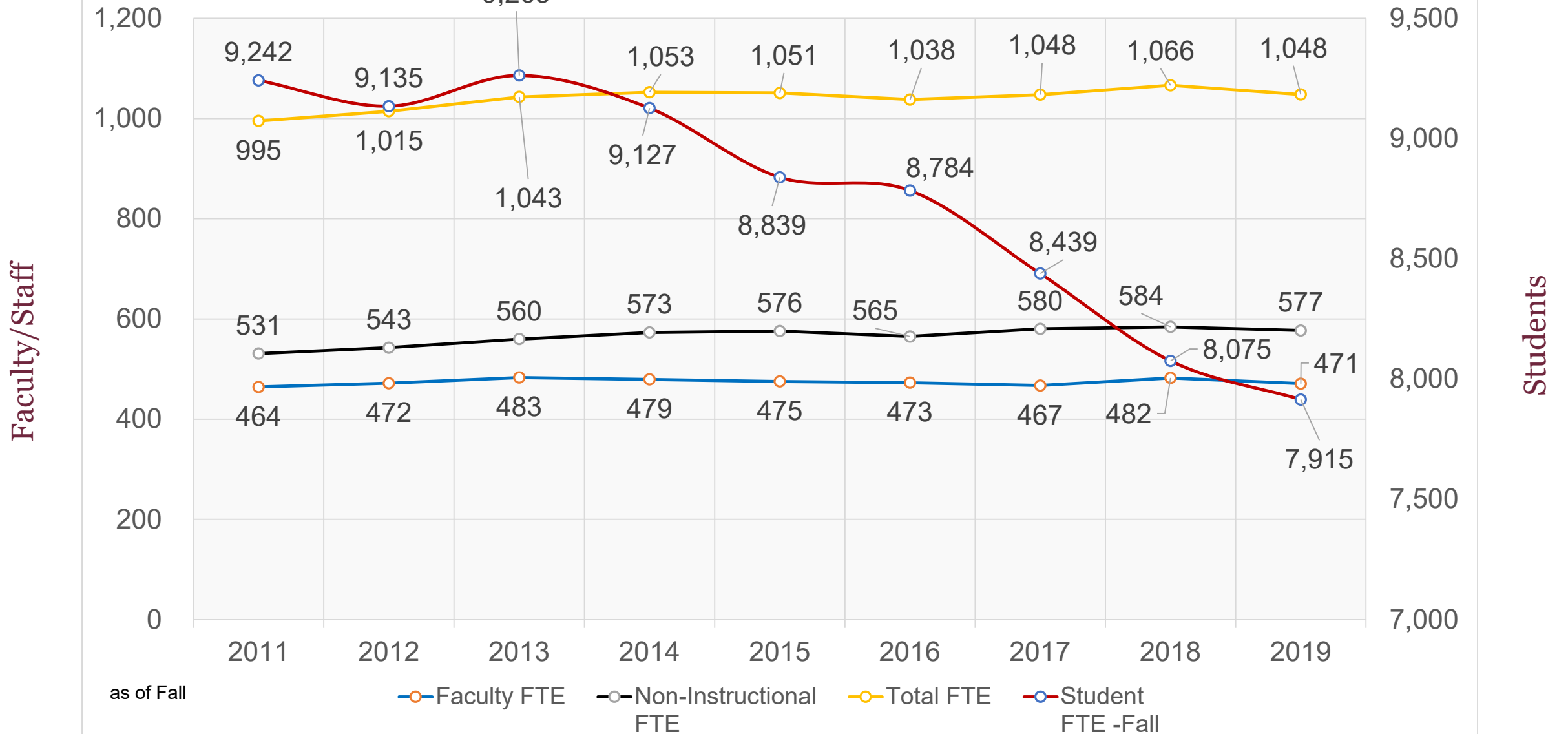
** Faculty/Staff FTE is as of the previous FY End

Student Head Count to Faculty/Staff FTE
Fall 2011-Fall 2019

as of Fall	2011	2012	2013	2014	2015*	2016	2017	2018	2019
Total FTE	995	1,015	1,043	1,053	1,110	1,038	1,048	1,066	1,048
Student Head Count-Fall Start	10,159	9,950	10,127	9,998	9,777	9,658	9,287	8,924	8,689
Non-Instructional FTE	531	543	560	573	576	565	580	584	577
Faculty FTE	464	472	483	479	475	473	467	482	471

Faculty/Staff (left axis: 0, 300, 600, 900, 1,200)
Students (right axis: 0, 3,000, 6,000, 9,000, 12,000)

Legend: —o— Faculty FTE   —o— Non-Instructional FTE   —o— Total FTE   —o— Student Head Count-Fall Start

*   Faculty Reduction a result of reducing temp pool faculty

** Faculty/Staff FTE is as of the previous FY End

Employee Surveys

- Campus Employee Satisfaction Survey

- PASSHE Culture and Engagement Survey

Campus Employee Satisfaction Survey (CESS)

Overall Employment Satisfaction	2019 Mean	2016 Mean	Sign diff
Rate your overall satisfaction with your employment here so far:	3.62	3.27	.001

Rate your satisfaction with your employment here:	2019 Mean	2016 Mean
Staff	3.41	3.36
Faculty	3.40	3.09
Less than 6 years here	3.71	3.48
6 or more years	3.57	3.19
Female	3.62	3.34
Male	3.82	3.33

5 point scale: 1 - "not at all satisfied" 5 – "very satisfied"

CESS - Comparing 2016 and 2019

Employees rated their satisfaction with a range of campus issues on a 5 point scale.	2019 Mean	2016 Mean
There is good communication between the faculty and administration at this institution.	2.79	1.97
The leadership of this institution has a clear sense of purpose.	2.92	2.23
The reputation of this institution continues to improve.	3.04	2.36
This institution does a good job of meeting the needs of faculty.	3.08	2.44
Efforts to improve quality are paying off at this institution.	2.97	2.37
My university works to develop a strong sense of community.	3.21	2.63

CESS - Comparing 2016 and 2019

Employees rated their satisfaction with a range of campus issues on a 5 point scale.	2019 Mean	2016 Mean
I have adequate opportunities for professional development.	3.18	2.82
I am empowered to resolve problems quickly.	3.11	2.76
I have the information I need to do my job well.	3.51	3.18
My job responsibilities are communicated clearly to me.	3.60	3.30
The work I do is valuable to the institution.	3.75	3.45

PASSHE Culture and Engagement Survey
BU responses in comparison to PASSHE Faculty

Above Average	I understand the tenure process at PASSHE.
Average	Work demands at the university allow me to balance my personal and work life issues.
	My department chair communicates well.
	The university provides access to training/dev. Resources I need to do my job well.
	My workload is reasonable.
	I have the tools and resources needed to do my work well.
Below Average	Leadership consults with stakeholders at all levels of the org around key decisions.
	People on my team communicate well with each other.
	The executives do a good job of communicating information about System objectives.
	At the university, failures are seen as an opportunity for learning and growth.
	Faculty are encouraged to network across departments to find solutions to problems.

PASSHE Culture and Engagement Survey
BU responses in comparison to PASSHE Staff

Above Average	I feel my job is secure at the university.
	The university provides access to training and development resources that I need to do my job well.
Average	My manager and I talk regularly about my performance.
	I have the information and resources to manage my growth/learning effectively.
	My workload is reasonable.
	We have enough employees in my department/division to do our jobs well.
	I understand what I need to do to be successful in my position.
Below Average	People on my team communicate well with each other.
	The university leadership team communicates information about the university's objectives.
	The university leadership team provides a clear sense of direction.
	The university has a climate where people can challenge our way of doing things.
	I understand the university's strategic plan.

Personnel Updates

- Daryl Fridley, Dean, College of Education

- Mary Lou D'Allegro, Associate Vice President for Institutional Effectiveness

- Patricia Haney, Interim Dean of Students and Assistant VP for Student Affairs

- Associate Vice President for Human Resources

Other Updates

- Campus Emergency/Active Shooter Exercise

- Diversity and Inclusion Commission
    - Survey conducted Fall 2019
    - Results will be available late spring or early summer

- Arts and Administration Building
    - Projected completion – August 2020

Discussion

**Refreshments following in
Council of Trustees' Room**