



# President's Fall Update

University Forum

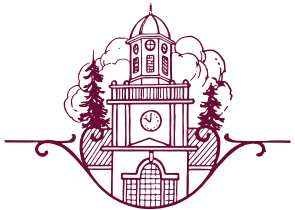
Wednesday, October 21, 2020

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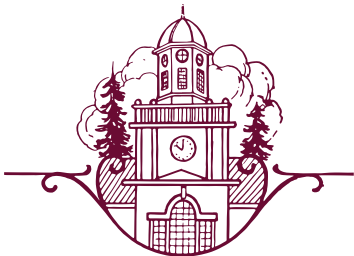
**BLOOMSBURG UNIVERSITY®**

# Agenda

- Employee of the Year
- Extraordinary Huskies
- Enrollment and Retention
- Financial Analysis
- Institutional Strategic Goals Update
- Integration Update
- Spring 2021 Semester Update



# Employee of the Year Vince Kozlek



# Extraordinary Huskies

Lori Achey  
Luke Betley  
Traci Boehret  
Beth Brennan  
Beth Coladonato  
Mike Collins  
Erik Evans  
Sharon Fedder  
Tom Fletcher  
Eric Foster  
Audra Halye

Kathy Heitzman  
Bridget Hilferty  
Jen Hunsinger  
Karen Johns  
Nicole Keller  
Niall Makar  
Jim McCormack  
Frank Michaels  
Lynda Michaels  
Karen Murtin  
Ted Roggenbuck

John Sanow  
Michele Stout  
Kevin Strickland  
Claudia Thrush  
Gisele Tobin  
Mark Turnbough  
Jennifer Umberger  
Ed Webb  
Renelle Wetzel  
Marty Wygmans  
Rich Yoder

Kim Zalewski  
Tom Zalewski  
Derrell Johnson-  
Koulianos  
Jennifer Raup



# Fall 2020 Enrollment



# Continuing Student Enrollment

		B	C	D
		Goal	As of 9.4.2020	Variance (from goal)
3	FT Continuing Undergraduate	4588	4805	217
4	PT Continuing Undergraduate	442	463	21
5	<b>Total Continuing Undergraduate</b>	<b>5030</b>	<b>5268</b>	<b>238</b>
6				
7	<b>Continuing Graduate</b>	<b>397</b>	<b>387</b>	<b>-10</b>
8				
9	<b>All Continuing Students</b>	<b>5427</b>	<b>5655</b>	<b>228</b>

# New Student Enrollment

		B	C	D
		Goal	As of 9.4.2020	Variance
3	FT New Undergraduate	2000	1592	-408
4	FT New Transfer Undergraduate	396	355	-41
5	<b>Total New Undergraduate</b>	<b>2396</b>	<b>1947</b>	<b>-449</b>
6				
7	<b>New Graduate</b>	<b>300</b>	<b>304</b>	<b>4</b>
8				
9	<b>All New Students</b>	<b>2696</b>	<b>2251</b>	<b>-445</b>
10				
11	<b>Grand Total - All Students</b>	<b>8123</b>	<b>7906</b>	<b>-217</b>

# Retention

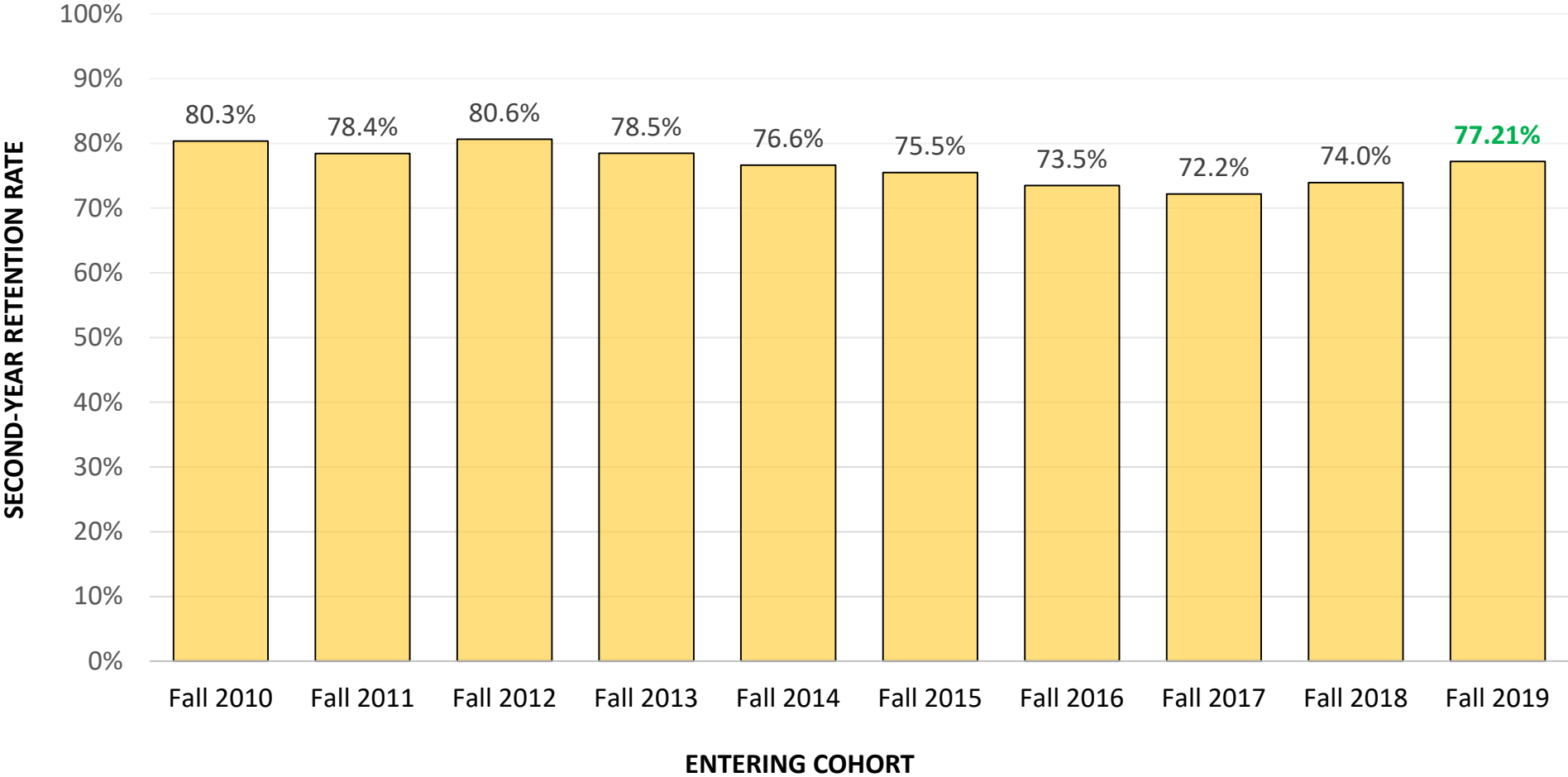




# Second-Year Retention Rates

## First-Time, Full-Time Student Cohorts

### Fall 2010 through Fall 2019



# Retention

## First-Time, Full-Time Student Cohorts

### Fall 2010 through Fall 2019

#### Gender

Cohort Year	Cohort Size	SAT Ave <sup>1</sup>	Retention Year 2
<b>Male</b>			
Fall 2010	873	1016	78.47%
Fall 2011	842	1025	76.37%
Fall 2012	824	1010	80.34%
Fall 2013	914	997	77.13%
Fall 2014	867	996	74.97%
Fall 2015	869	1002	72.38%
Fall 2016	833	988	69.87%
Fall 2017	782	1063	67.26%
Fall 2018	770	1070	70.91%
Fall 2019	760	1057	73.42%
<b>Female</b>			
Fall 2010	1263	991	81.63%
Fall 2011	1129	988	79.98%
Fall 2012	1086	979	80.85%
Fall 2013	1293	969	79.43%
Fall 2014	1295	961	77.76%
Fall 2015	1233	964	77.70%
Fall 2016	1062	964	76.37%
Fall 2017	1071	1051	75.82%
Fall 2018	1073	1065	76.14%
Fall 2019	1219	1043	79.57%

<sup>1</sup> The SAT averages for cohorts subsequent to Fall 2016 are not comparable to the SAT averages for prior cohorts due to the redesign of the SAT in 2016.



# Retention First-Time, Full-Time Student Cohorts Fall 2010 through Fall 2019

## Underrepresented Minority (URM) vs Non-URM Freshmen<sup>1</sup>

Cohort Year	Cohort Size	SAT Ave <sup>2</sup>	Retention Year 2
<b>URM</b>			
Fall 2010	271	875	72.32%
Fall 2011	260	867	68.85%
Fall 2012	335	881	77.61%
Fall 2013	386	888	70.73%
Fall 2014	412	871	68.45%
Fall 2015	430	886	66.74%
Fall 2016	413	882	62.47%
Fall 2017	385	986	57.66%
Fall 2018	277	996	61.73%
Fall 2019	318	969	70.13%
<b>Non-URM</b>			
Fall 2010	1783	1021	81.66%
Fall 2011	1652	1024	80.08%
Fall 2012	1545	1017	81.42%
Fall 2013	1777	1001	80.14%
Fall 2014	1725	998	78.67%
Fall 2015	1642	1003	77.59%
Fall 2016	1463	1000	76.62%
Fall 2017	1426	1075	75.74%
Fall 2018	1356	1070	75.59%
Fall 2019	1510	1063	79.34%

<sup>1</sup> Chart excludes freshmen of unknown race/ethnicity and non-resident aliens.

<sup>2</sup> The SAT averages for cohorts subsequent to Fall 2016 are not comparable to the SAT averages for prior cohorts due to the redesign of the SAT in 2016.



# Retention

## First-Time, Full-Time Student Cohorts

### Fall 2010 through Fall 2019

#### MALE: Underrepresented Minority (URM) vs Non-URM Freshmen<sup>1</sup>

Cohort Year	Cohort Size	SAT Ave <sup>2</sup>	Retention Year 2
<b>URM</b>			
Fall 2014	161	896	68.32%
Fall 2015	175	910	59.43%
Fall 2016	180	910	56.11%
Fall 2017	183	988	52.46%
Fall 2018	139	988	61.87%
Fall 2019	131	978	65.65%
<b>Non-URM</b>			
Fall 2014	693	1018	76.48%
Fall 2015	681	1024	75.48%
Fall 2016	639	1009	73.71%
Fall 2017	574	1088	70.91%
Fall 2018	557	1083	72.53%
Fall 2019	575	1074	75.48%

<sup>1</sup> Chart excludes freshmen of unknown race/ethnicity and non-resident aliens.

<sup>2</sup> The SAT averages for cohorts subsequent to Fall 2016 are not comparable to the SAT averages for prior cohorts due to the redesign of the SAT in 2016.



# Retention

## First-Time, Full-Time Student Cohorts

### Fall 2010 through Fall 2019

#### FEMALE: Underrepresented Minority (URM) vs Non-URM Freshmen<sup>1</sup>

Cohort Year	Cohort Size	SAT Ave <sup>2</sup>	Retention Year 2
<b>URM</b>			
Fall 2014	251	855	68.53%
Fall 2015	255	868	71.76%
Fall 2016	233	861	67.38%
Fall 2017	202	984	62.38%
Fall 2018	138	994	61.59%
Fall 2019	187	962	73.26%
<b>Non-URM</b>			
Fall 2014	1032	985	80.14%
Fall 2015	961	988	79.08%
Fall 2016	824	992	78.88%
Fall 2017	852	1067	78.99%
Fall 2018	799	1069	77.72%
Fall 2019	935	1043	81.71%

<sup>1</sup> Chart excludes freshmen of unknown race/ethnicity and non-resident aliens.

<sup>2</sup> The SAT averages for cohorts subsequent to Fall 2016 are not comparable to the SAT averages for prior cohorts due to the redesign of the SAT in 2016.



# Retention

## First-Time, Full-Time Student Cohorts

### Fall 2010 through Fall 2019

#### Pell Grant Recipients First-Year vs Non-Pell Grant Recipients

Cohort Year	Cohort Size	SAT Ave <sup>1</sup>	Retention Year 2
<b>Pell Recipient</b>			
Fall 2010	639	955	76.21%
Fall 2011	579	956	75.99%
Fall 2012	607	949	77.10%
Fall 2013	714	938	77.87%
Fall 2014	770	931	72.99%
Fall 2015	686	932	71.43%
Fall 2016	662	927	67.07%
Fall 2017	652	1021	63.96%
Fall 2018	648	1034	69.91%
Fall 2019	703	1009	72.26%
<b>Non-Pell Recipient</b>			
Fall 2010	1475	1021	82.31%
Fall 2011	1364	1024	79.62%
Fall 2012	1293	1013	82.21%
Fall 2013	1489	1001	78.71%
Fall 2014	1392	999	78.66%
Fall 2015	1416	1002	77.47%
Fall 2016	1233	1000	76.97%
Fall 2017	1201	1075	76.69%
Fall 2018	1195	1085	76.15%
Fall 2019	1276	1070	79.94%

<sup>1</sup> The SAT averages for cohorts subsequent to Fall 2016 are not comparable to the SAT averages for prior cohorts due to the redesign of the SAT in 2016.



# Financial Analysis



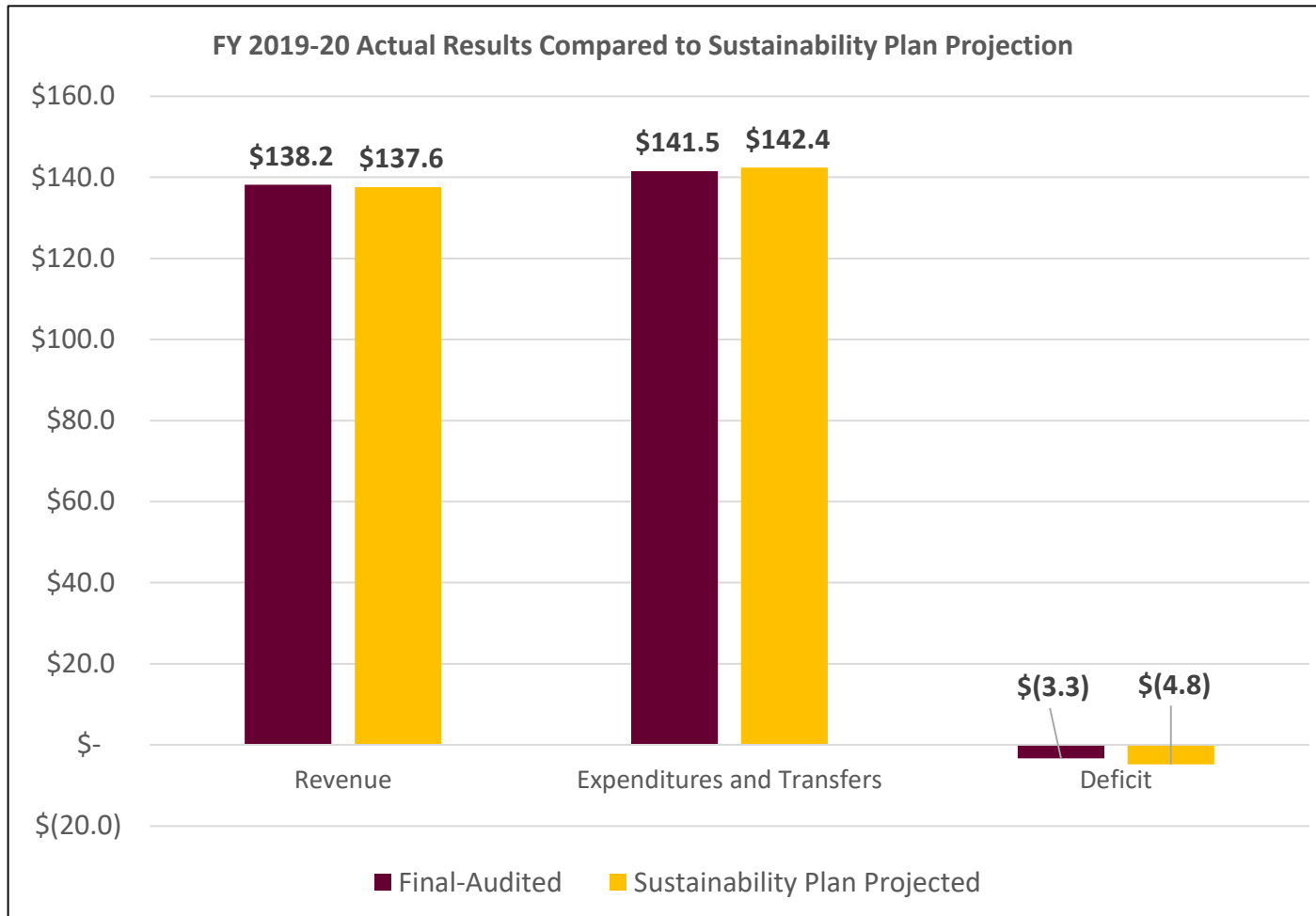
# **E&G Operations Actual Results FY 2019-20**





# Actual Results – FY 2019-20

E&G Operations (as of 6.30.20 - audited)



- Actual shortfall \$1.5M better than projected on Sustainability Plan v. 2 (June 2020) primarily due to:
  - Delayed transfer to plant for sound mitigation projection to 2021 to better align with project expenditures (\$1.0M)
  - ESCO bond refinancing not included in Sustainability Plan v.2 (\$0.4M)
- Shortfall (use of unrestricted net assets) composition:
  - E&G General Fund - \$2.4M
  - E&G Special Programs/Self-Supporting - \$0.9M

# E&G and Auxiliary (Including Plant Funds) Consolidated Financial Projections

(dollars in millions)	FY 2020-21	FY 2021-22	FY 2022-23
<b>E&amp;G and Auxiliary Operations:</b>			
Revenues	\$173.3	\$177.4	\$186.7
Operating Exp./Net Trfs. To Plant	(178.9)	(176.9)	(187.7)
<b>(Deficit)/Surplus</b>	<b>\$(5.6)</b>	<b>\$ .5</b>	<b>\$(.9)</b>
Net Assets, Beginning of Year	32.9	27.3	27.8
<b>Net Assets, End of Year</b>	<b>\$27.3</b>	<b>\$27.8</b>	<b>\$26.9</b>
<b>E&amp;G and Auxiliary Plant:</b>			
Net Trfs. (Out To)/In From E&G and Aux Operations	\$-	\$2.3	\$3.7
Capital Investments	(10.6)	(2.0)	(.8)
Net Assets, Beginning of Year	35.0	24.4	24.7
<b>Net Assets, End of Year</b>	<b>\$24.4</b>	<b>\$24.7</b>	<b>\$27.6</b>
<b>Total Net Assets, End of Year</b>	<b>\$51.7</b>	<b>\$52.5</b>	<b>\$54.5</b>

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# CPP Submission Key Takeaways - FY 2020-21 through 2022-23

- 2019-20 performance resulted in relatively strong sustainability metrics indicators; maintained “stable” plan status

	2019 Results			
University	FTE Students	Operating Margin	Primary Reserve	Minimum Reserves
Bloomsburg	(8.9)%	2.4%	47.0%	193

2020 Results			
FTE Students	Operating Margin	Primary Reserve	Minimum Reserves
(7.3%)	1.7%	44.5%	191

- Fall 2020 enrollment results were solid despite the pandemic; FY 2020-21 annualized FTE enrollment projected to drop by only 2.7%; rebound expected beginning in FY 2021-22 as incoming cohorts are projected to return to pre-pandemic levels
- Despite expected rebound in enrollment, FY 2022-23 projections are still 16% below actual peak enrollment (FY 2011-12); in order to meet 2022-23 enrollment projections, retention must remain a priority
- Workforce reductions incorporated into the CPP will achieve balanced budgets and, thus, required ratio targets and financial sustainability by FY 2021-22
- Restoration of E&G capital funding needs to be considered for FY 2023-24 or sooner, if possible (annual E&G transfer to plant has been reduced by 50% (\$1.0M) for FY 2020-21 and FY 2021-22 to help balance the budget
- Auxiliary performance (FY 2019-20 required reallocation of funds from Auxiliary plant to Auxiliary operations to cover COVID-19 refund deficits (\$4.5M) and FY 2020-21 requires significant use of Auxiliary plant reserves to balance the Auxiliary operations budget (\$4.1M))
- To view the full financial update briefed at the September 24 Planning and Budget meeting please visit:
  - <https://intranet.bloomu.edu/documents/budget/BOG-Budget-Summaries-Fall2020.pdf>
  - <https://intranet.bloomu.edu/documents/budget/FinancialUpdate-Fall2020.pdf>

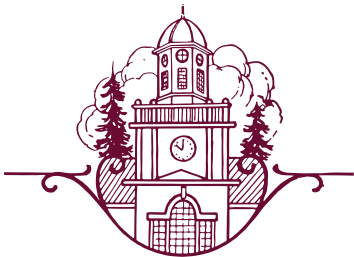
# Supplemental Information



# Supplemental Information-Estimated Financial Impact, Not Included in CPP, Related to 8/31 Pivot to Remote Learning (as of 9.11.20)

(dollars in millions)	University (E&G)	University (Auxiliary)	Affiliate	Total	Funding Source if Additional Stimulus Not Received
Tuition (difference b/w “after drop/add” & “official”)	\$.5			\$.5	Reserves
Housing Fee (Including Utility Charge)		\$2.6		\$2.6	Op Cost Reductions/Reserves
Meal Fee, Including Flex \$		1.0		1.0	Contract Reductions/Reserves
Student Union Operation Fee		1.2		1.2	Op Cost Reductions/Reserves
Community Activity Fee			1.0	1.0	Op Cost Reductions/Reserves
Recreation Fee		.4		.4	Op Cost Reductions/Reserves
Transportation Fee	.3			.3	Op Cost Reductions/Reserves
Addt’l Distance Ed Payments (Fall/Spring)	\$.6			\$.6	Reallocation of Title V Funds (Fall)/GEER Funds (Spring)
<b>Total</b>	<b>\$1.4</b>	<b>\$5.2</b>	<b>\$1.0</b>	<b>\$7.6</b>	

# Institutional Strategic Goals Update



# Institutional Goal Updates

GOAL	2018-19' Fall 2019 RESULTS	2019-'20 Fall 2020 GOAL	2019-'20 Fall 2020 RESULTS	GOAL Outcome
Maintain first-time, full-time student enrollment of 2,000 students for the Class of 2024 (entering Fall 2020).	2000	2000	1592	Not Met
Increase graduate enrollment by 3 - 5%, compared to the Fall 2019 graduate enrollment of 697 students.	697	718-732	691	Not Met
Increase new transfer student enrollment by 8 - 10%, compared to the Fall 2019 transfer enrollment of 367 students.	367	397-404	355	Not Met
Increase Fall 2020 yield for first-time, full-time students by 1% comparable to the Fall 2019 yield of 29.2%.	29.2%	30.2%	24.6%	Not Met
Increase first-to-second-year student retention by 1 - 2% in Fall 2020, compared to the Fall 2019 retention rate of 74% (entering Fall 2018).	74%	75%-76%	77.21%	Met

# Institutional Goal Continued

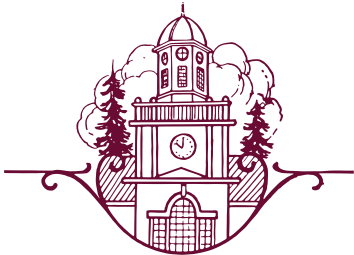
GOAL	2018-19' Fall 2019 RESULTS	2019-'20 Fall 2020 GOAL	2019-'20 Fall 2020 RESULTS	GOAL Outcome
Establish criteria for co-curricular experiences with plan to expand them by 5%			In process	
Expand student civic and service-learning opportunities by 5%			In process	
Increase annual gifts and pledges by 10%	\$10M	\$11M	\$15,780,829	Met
Provide professional development opportunities for faculty and staff so that they may excel for the benefit of our students and their success				Ongoing
Begin implementation of Diversity and Inclusion recommendations that emerged from the Campus Climate Survey for Diversity and Inclusion				Partially Met
Complete Phase II of brand implementation				Met



# Integration Update



# **July 2020 Board of Governors Meeting**



# Recommendations to the Board (1 of 3)

1. **Conduct financial stability review focusing on three combinations of potential university integrations**
2. **Assume for the review that each integration entails:**
  - One leadership team
  - A single faculty and staff
  - A single program array
  - A unified enrollment management strategy
  - A single, combined budget
  - One reporting relationship through the Chancellor to the Board
3. **Be open to analysis leading to different integration models/approaches and/or allow for different university combinations**

# Recommendations to the Board (2 of 3)

## 4. Focus review on three universities combinations:

- **California and Clarion** – in addition to on-campus programs, this integration seeks to stand up a low-cost, high-quality online undergraduate degree and degree-completion program that is not currently available in the state
- **Edinboro and Slippery Rock** – seek to strengthen and broaden available educational programming by adopting an aligned approach to the academic program array of the two universities—driving down operating costs (e.g., through programmatic alignment and through consolidation of administrative and business operations and staff functions) and through a coordinated enrollment strategy
- **Lock Haven and Mansfield** – seek to develop non-degree and stackable credentials that meet workforce needs in selected high demand occupations and concentrating on adult students—all in partnership with regional employers

# Recommendations to the Board (3 of 3)

## 5. Include in the review the following key components

- Implementation costs and funding sources
- High-level governance model and accreditation issues
- Academic program array opportunities and financial impacts
- Financial and administrative opportunities and financial impacts
- High-level recommendation to achieve financial sustainability
- Establishment of a collaborative consultation process for planning and implementation

## 6. Undertake policy and procedure reviews as may be required

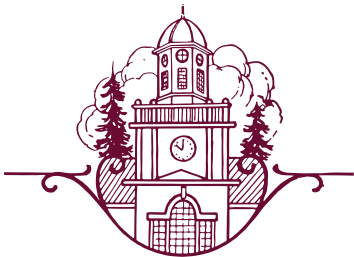
- Financial (including appropriations formula), Academic, Student, Personnel

## 7. Ensure continuity of key System Redesign activities

- Implementation of v2 sustainability plans
- Shared Services Development and IT governance
- Academic Master Planning
- Infrastructure supporting Student Portability (e.g., OneSIS)

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# **October 2020 Board of Governors Meeting**



# Shifts in the Planning Process

The transition from the financial review to implementation planning will entail higher level of engagement of and support for university-level effort.

	FINANCIAL REVIEW PHASE	IMPLEMENTATION PLANNING PHASE
STRATEGIC LEADERSHIP	<ul style="list-style-type: none"><li>Framed and led and executed at the State System / Chancellor's Office</li></ul>	<ul style="list-style-type: none"><li>Led by the State System comprising leads from each of the integration teams</li></ul>
OPERATIONAL TEAMS	<ul style="list-style-type: none"><li>Largely comprised of OOC staff (with peer CAO and CFO), with input on early stage vision/mission considerations through facilitated meetings of university leadership</li><li>Consultation focused narrowly on CoTs, statewide collective bargaining units, members of the General Assembly</li></ul>	<ul style="list-style-type: none"><li>Led by university relying on functional teams commissioned and charged by a university-level integration team and involving expert informants, conducting planning according to a common System-supplied framework</li><li>Consultation focused more broadly on key statewide as well as university and community constituencies based on topics</li></ul>
PLANNING SUPPORTS	<ul style="list-style-type: none"><li>Focused on the OOC</li></ul>	<ul style="list-style-type: none"><li>Focused on university-level work</li></ul>

# Planning Governance Structure





# Faculty and Staff Virtual Town Hall

**Tuesday, November 17  
2:30 p.m.**



**Faculty and Staff**

# TOWN HALL



**Tuesday, Nov. 17  
2:30 p.m.**

**Zoom Webinar**

**<https://bloomu.zoom.us/j/94637104737>**

**Webinar ID: 946 3710 4737  
or dial in: +301 715 8592**

\*session will be recorded for those unable to attend

# Spring 2021 Semester Update



# Questions

