

## **Vision**

**To provide students with the premier undergraduate experience in American higher education.**

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## Important Definitions

A **mission** describes in broad terms the fundamental reasons for an organization's existence — who the organization serves, and what it seeks to accomplish for those served. For educational institutions, missions focus on student **outcomes** — the transformational changes expected in students by graduation.

Missions will sometimes include other text describing the characteristic manner in which the institution delivers its educational services. Such commentary relates to **process** rather than outcomes. While process descriptions are often helpful to the community in defining distinctive educational approaches that are valued by the institution, such descriptions are not strictly part of the mission itself. The outcomes, not the processes, define the reason for an institution's existence.

Within the boundaries established by the mission, a **vision** is an aspirational description of the institution's future. Bucknell's regional accrediting agency, the Commission of Higher Education of the Middle States Association of Colleges and Schools, asserts clearly that **vision**, not mission, is most closely related to the process of strategic planning. A vision is more specific than a mission and thus allows an institution to develop particular strategies for achieving its aspirations.

Throughout *The Plan for Bucknell*, the term **strategy** is used to describe a broad priority or direction for the University. A strategy has the potential to affect Bucknell significantly over the long term and is essential to achieving the institution's vision. This usage is comparable to the term "goal" in some other planning terminology. Because a strategy is conceived broadly, it is not in itself measurable.

Within each strategy, the term **initiative** has been used to describe more specific approaches that will advance the overall strategy. This usage corresponds to the term "objective" in some other planning terminology. Subsequent planning by faculty and staff will provide additional specificity to these initiatives.

*The Plan for Bucknell* has intentionally avoided addressing **tactics**, which are very specific actions aimed at readily achievable, near-term results. While strategy relates to the broad direction and priorities of the institution over an extended time period, tactics relate to operational activities employing current or projected resources, typically within a given fiscal year. The implementation of specific tactics will be measured by **metrics**, which will qualitatively and quantitatively determine the success of the tactic.

When the strategic plan is completed, a **campaign needs list** will be developed for those initiatives that will require new funding. The case, or rationale, for supporting the campaign needs will be described in a **case statement** — a comprehensive and compelling publication that will serve as the source for a number of other campaign communications.

## Background and Context

Since its founding in 1846, Bucknell University has grown from a small, sectarian regional college to a non-denominational, highly selective national liberal arts university\* of approximately 3,500 full-time students. The Bucknell experience now extends worldwide, from the geographic origins of students, faculty, and staff, to our study abroad and internship programs, to the residences of our alumni. For 160 years, the University has remained true to its fundamental purpose: to educate and prepare students for lives that make a difference and have a positive impact on the world.

The paths alumni have chosen to make their own impact are widely varied. For current Bucknell students living in a world of enormous possibilities, one of the major tasks of self-development is making an informed choice of a direction and purpose for their lives.

Our graduates today face a world vastly different from the one familiar to the institution's founders. It is a world at once globally interconnected and interdependent, yet divided. It is a world diverse in a multiplicity of dimensions. It is a world where knowledge and information grow exponentially, and where advances in science and technology occur faster than the abilities of our social institutions to adapt. It is a world of growing complexity, driven by change and uncertainty.

To navigate this world successfully and lead lives that are personally fulfilling and contribute meaningfully to society, Bucknell graduates now require a different set of skills and abilities. They must be able to appreciate different perspectives; question established wisdom as independent and critical thinkers; imagine new possibilities; communicate effectively; efficiently manage people and resources; and be guided by personal integrity and a strong ethical compass.

What are the optimal conditions for nurturing such 21st century skills? From its inception, Bucknell has provided wide resources — both curricular and co-curricular — to encourage students to explore, do, and become many things. The students who choose Bucknell are characteristically well-rounded and intellectually gifted, with high school successes in academics, service, leadership, and athletics. Their college experience must enrich and expand those accomplishments. The opportunities for transforming experiences are enhanced within a highly engaged, residential learning and living community of students, teacher-scholars, and staff.

As a learning community, Bucknell fosters deep, sustained, and highly transferable learning. Faculty and staff collaborate to create an environment in which students develop intellectual maturity, habits of critical self-reflection, and aspects of character that are required for making wise and informed choices for their lives.

In the curriculum, one area of exciting opportunities lies at the intersections of different fields, where the juxtaposition of ideas and disciplinary perspectives can create new insights and new possibilities. With its wide offerings in the liberal arts and professional programs, Bucknell provides fertile ground for cross-disciplinary initiatives that complement and enhance traditional disciplinary perspectives. This diverse curriculum, representing a fundamental institutional commitment to supporting both liberal arts and professional studies, bridges the theoretical and the practical, the abstract and the applied.

Students benefit as well from the Bucknell faculty's commitment to original scholarship. Through exposure to the most current thought in their fields of study, students are educated in creative modes of analysis. Across the University, faculty research also creates many opportunities for students to pursue undergraduate research.

As a close-knit residential community, Bucknell is a place where undergraduates develop lasting friendships with classmates, and enduring relationships with faculty and staff which sustain them personally and professionally over a lifetime.

To continue to fulfill its historic purpose and provide the highest quality preparation for students who will face the challenges of the 21st century, Bucknell will require a new agility. The University will have to adapt its programs and services, augmenting traditional modes of instruction with innovative pedagogies where appropriate. On campus, co-curricular activities must support and complement in-class learning, so every teachable moment contributes to student growth and development. To be most effective, the composition of the student body, faculty, and staff must reflect the many forms of diversity that characterize American society and an intercultural world. Supporting these initiatives will require careful stewardship of existing financial and physical resources, and determined efforts to expand the University's resource base.

Campus-based resources alone are no longer sufficient, regardless of their quality and abundance. Bucknell must utilize local, state, national, and international venues that can serve as extended laboratories for active learning. By actively engaging the world in which they will ultimately live and work, students will learn more powerfully. The University must cultivate partnerships, relationships, and opportunities to place students in structured situations with high potential for learning and growth.

Looking ahead to the requirements for a 21st century higher education, this strategic plan thus begins with a re-affirmation of certain historic institutional commitments:

- To undergraduate liberal arts and professional programs in a residential college setting;
- To the academic core and its centrality to the institution's historic mission and continuing vision;

- To the teacher-scholar model, which values excellent teaching and the creation and dissemination of new knowledge and other scholarly and creative works;
- To a personalized education involving close student-faculty interaction;
- To service to society and the preparation of students for positions of leadership and engaged public citizenship;
- To the academic freedoms that encourage creative exchanges and diversity of thought;
- To diversity in all its forms;
- To the value of an enduring, strong and supportive community, including a residential, developmental learning environment within which students, faculty, and staff put into practice the goals of a Bucknell education every day.

The strategic planning process builds upon these historic institutional strengths and values to achieve even higher levels of quality and prominence for Bucknell. The narrative that follows presents the University's Mission and Vision, the rationale for each of its five strategies, and the specific initiatives through which each strategy will be advanced. The key to Bucknell's future is sustained focus on and commitment to these strategies.

\*Please also see Glossary

## **Mission**

Bucknell is a unique national university where liberal arts and professional programs complement each other. Bucknell educates men and women for a lifetime of critical thinking and strong leadership characterized by continued intellectual exploration, creativity, and imagination. A Bucknell education enables students to interact daily with faculty who exemplify a passion for learning and a dedication to teaching and scholarship. Bucknell fosters a residential, co-curricular environment in which students develop intellectual maturity, personal conviction and strength of character, informed by a deep understanding of different cultures and diverse perspectives. Bucknell seeks to educate our students to serve the common good and to promote justice in ways sensitive to the moral and ethical dimensions of life.

Bucknell's rich history and heritage will influence its planning for the future. Bucknell's potential as an institution of higher learning extends beyond that of a traditional liberal arts college by virtue of its larger size and expansive programs. The University's broader spectrum of disciplines and courses of study within a diverse and active residential campus community enhance the quality of all aspects of the undergraduate experience, both in and out of the classroom.

## **Vision**

**To provide students with the premier undergraduate experience in American higher education.**

Bucknell will offer an academic program that is challenging and distinctive, with the capacity to prepare its graduates for successful personal, professional, and civic lives in the 21st century. Bucknell's residential life and co-curricular activities will fully support its academic program. This integrated environment for student learning and growth, enhanced by diversity in all its forms, will build connections to a global society. In doing so, Bucknell will emerge from a place of strength to a position of pre-eminence within American higher education.



## **Strategies and Initiatives**

### **Strategy One:**

#### **Strengthen the Academic Core**

**Bucknell will offer an academic program that achieves the highest standard of quality across its liberal arts and professional programs. Bucknell supports innovation and distinctiveness in areas of current and emerging importance and relevance.**

#### **Rationale**

Colleges and universities are faced today with growing — and often competing — demands and expectations. By placing Strengthening the Academic Core as the first of five strategies for the next decade, Bucknell reaffirms the centrality of its academic mission — a predominantly undergraduate liberal arts education complemented by professional programs — to the future vitality and success of the institution. The quality of the academic enterprise will drive Bucknell's ascent to even higher levels of distinction.

If the academic mission is central to the future of the University, the role of the faculty is central to the fulfillment of the academic mission. Bucknell recruits and employs the finest teacher-scholars — individuals who aspire to be leaders both in the arts of teaching and in their disciplinary field of expertise. The University must provide the resources necessary in both areas to guarantee faculty realize that aspiration. Part of the distinctiveness of the Bucknell learning experience is the opportunity for students to interact daily with faculty and staff who exemplify a passion for learning and a dedication to the life of the mind — a life of intellectual exploration, creativity, and imagination. In affirming the centrality of the academic core, Bucknell also rededicates itself to an environment that nurtures, protects, and celebrates these values, all within the context of an unwavering commitment to academic freedom.

To provide students with an education that fulfills our Mission and Vision, Bucknell must create a campus culture, in and out of the classroom, that values diversity in all of its forms and that ensures high student engagement.\* Certain kinds of institutional practices are known to be associated with powerful learning: a high level of academic challenge, close student-faculty interaction, opportunities for collaborative learning, enriching educational experiences, and a supportive campus environment. Students must be encouraged to sample widely and deeply from among the extensive educational opportunities available to them. They must become active and engaged participants in their education. Talented and accomplished when they first arrive at Bucknell, they also must be challenged to exceed their own expectations.

Bucknell's fundamental commitment to highly individualized student attention extends also to the faculty and staff's role as "guide" in a variety of settings. One of the most significant guiding roles is to help students make wise choices from among the rich opportunities available to them during their time at Bucknell. The choices that students make are the clearest expression of that most elusive of educational goals: the development of character and strong personal convictions. Teaching students to make responsible choices that will serve them over a lifetime is thus an important way faculty and staff can educate for character, for ethics and values, and for personal responsibility. The informal interactions with respected faculty and staff are among the important venues for values education.

In planning the strategy for Strengthening the Academic Core, we must be mindful of the heightened public demand for accountability. From legislators to newspapers and magazines, from college guides to prospective students and their parents, all are demanding a clear, evidence-based demonstration of the benefits of a college education. Given the cost of higher education, there is also a cost-benefit accountability — value for price. The assessment of student learning outcomes is now a formal expectation for institutional accreditation and thus, for qualifying for federal financial aid. Together, clear institutional goals for student learning, new knowledge about how students learn, an expanded set of pedagogical tools, and new techniques for assessment of student learning, all orchestrated by a superior faculty of dedicated teacher-scholars, offer substantial promise for dramatic improvements in the value that Bucknell can offer to its students.

The central purpose of Strengthening the Academic Core is to ensure that a Bucknell education meets the highest standards of excellence — an education that is challenging, engaging, and produces powerful and demonstrable results in student learning, growth, and development. Pursuing the practice of education with openness to new ideas and a culture of innovation will deepen the educational experience of our students, promote creativity among our faculty and staff, and collectively ensure the University's future viability. Bucknell's ability to adapt and lead change in this area will be a mark of distinction within higher education.

#### **Initiatives**

- Strengthen the individualized student learning experience, addressing the issues of faculty resources and course load within the context of current and future curricular needs.
- Ensure the relevance of the University's curricula and identify opportunities for innovation, cross-disciplinary studies, and creative expression, within a student-centered learning environment.
- Evaluate the academic affairs division to further the student-centered environment.

- Develop areas of programmatic excellence that build on Bucknell's liberal arts and professional programs and the University's emerging strengths.
- Become more distinctive nationally and internationally in our academic programs.
- Increase the opportunity, time, and resources for faculty to engage in new developments in their own fields of scholarship, instructional technology, or pedagogies.
- Encourage and support student participation in academic activities representing high levels of challenge, engagement, and close interaction with faculty.

## **Strategy Two: Deepen the Residential Learning Experience**

**Bucknell will provide an integrated, residential learning and living experience\* that supports and complements the academic program. Bucknell's close-knit residential community will promote personal growth and development, a sense of justice and ethical responsibility, and a commitment to civic engagement.**

### **Rationale**

The revolution in our understanding of student learning has affected dramatically our thinking about the out-of-class lives of students. If structured properly, campus and community activities, athletics, and residence halls are all potential laboratories for deep student learning and growth. High levels of personal engagement in a range of diverse and challenging activities can support and enhance students' learning within the academic curriculum.

Bucknell's goal as a student-centered institution is to provide students with an environment within which learning fills all the dimensions of university life. The Vision's supporting paragraph states this commitment unambiguously: "Bucknell's residential life\* and co-curricular\* program will fully support its academic program," and will provide an "integrated environment for student learning and growth." This challenging concept will require new levels of collaboration and coordination between academic affairs and student life.

This goal is a worthy one for Bucknell. The University seeks to develop students who will lead productive and satisfying lives that contribute to the betterment of our society. This requires attention to the mind, the body, and the communities in which we live. There are certainly boundaries between these areas of students' lives, and students value these separations. At the same time, students do not live their lives in isolated compartments; developments in each exert powerful influences on the others.

At the national level, on-line learning, commuter colleges, and honors colleges at large state universities are transforming the competitive environment of higher education. Yet positive student learning outcomes continue to be associated most strongly with a highly personal, residential learning community. This is the kind of environment that students of high ability seek in their college choice, and it is one of the defining characteristics of a Bucknell education that will continue to provide value and competitive advantage in the future.

Systematic out-of-class learning must begin, as in traditional academic settings, with a clear definition of student learning outcomes. Extensive planning and careful orchestration are also required to assure progress toward the achievement of these outcomes. In what ways can student life support what students learn in their classrooms? In what ways can it complement academic learning? What approaches will we choose? What metrics will be used to assess these efforts? What level must these metrics reach for us to consider our efforts a success? From a strategic financial perspective, investment in student affairs initiatives must be driven by careful assessment of their effectiveness in achieving the University's overall learning goals for its students.

The kinds of outcomes pursued through out-of-class activities are among the most difficult to assess because they often relate to student values. It is far easier to evaluate what students know or the skills they have developed. The end of the senior year is often much too soon to judge the development of certain values in our graduates. After graduation, students are more likely to experience challenges that bring to the fore the values acquired in college. As we develop programs to deepen the residential learning experience, our assessment methods must take a sufficiently long view of our alumni. To truly understand the effectiveness of our educational efforts, we will have to become students of the lives of our alumni.

### **Initiatives**

- Encourage students to engage in exploration and positive intellectual risk-taking.
- Create a student affairs program that focuses on the balanced integration of curricular and co-curricular programs.
- Structure the programming of residence halls and other living spaces to support Bucknell's myriad curricular and co-curricular programs.
- Integrate Bucknell's athletics and recreation program within the University's residential learning and living environment.

## **Strategy Three: Enhance Diversity**

**Bucknell will adopt an unwavering commitment to diversity in all its forms. This commitment will be carried out within a civil, supportive, and nurturing environment of open exchange.**

### **Rationale**

The strategic significance of Diversity for the future of Bucknell is compelling yet simple. Diverse perspectives and experiences in the classroom create more profound kinds of learning. Differences in race, ethnicity, culture, socioeconomic class, religion, political perspectives, geographic origins, gender, sexual orientation, and physical capabilities all contribute to a student's ability to examine issues from multiple and sometimes unique perspectives — a foundational skill for effective critical thinking. Out of class, sharing a complete residential experience in which students, faculty, and staff represent diversity in all its forms teaches students respect and appreciation for diverse people, places, cultures, and interests. That experience prepares Bucknell graduates to live and work in a democratic society that thrives on differences, and in a world that is globally integrated and intercultural.

Openness to diversity is not a new strategy for Bucknell. It is a fundamental institutional value reflected in the founders' acceptance of all individuals of good character who could benefit from a Bucknell education. These historic values, advanced for their time, are today both critical and essential for the University's future. They are represented in the University's Mission: students will develop a "deep understanding of different cultures and diverse perspectives."

Bucknell's comprehensive diversity strategy — embracing diversity in all its forms — is designed to ensure that students will benefit in transformational ways both on- and off-campus. On-campus initiatives seek to build a campus community characterized by multi-dimensional diversity that fosters productive interactions and civil discourse among community members. Further, it develops a campus climate that is receptive, welcoming, and supportive. Similar outcomes are sought through carefully structured off-campus experiences such as internships, study abroad, and strategic partnerships with community colleges, magnet schools, and other educational institutions with diverse student populations.

### **Initiatives**

- In all areas, further diversify the student body, faculty, staff, and Board of Trustees, addressing issues of recruitment, retention, and campus climate.
- Expand Bucknell's pool of prospective students and attract high quality achievers who exemplify our goal of diversity in all its forms.
- Establish mutually supportive working partnerships with other educational institutions with significantly diverse student populations.
- Ensure the sustainability of improvements in the diversification of the Bucknell community.
- Support developments in curriculum, pedagogy, and scholarship that promote an academic atmosphere reflecting Bucknell's commitment to diversity.

## **Strategy Four: Build Bridges**

**Bucknell will pursue a more progressive and multi-faceted interaction with local and regional constituencies and the outside world. The University will establish bridges to bring the world to Bucknell — and bring Bucknell to the world.**

### **Rationale**

Bucknell is and must be fully engaged with the events of our times in any part of the world as they are happening. Bucknell's location is a distinctive asset — it is a place of stunning beauty, a place to think, to grow, and to develop. It is also a place with a vibrant flow of information and ideas in and out of the institution. From its historic location in Lewisburg, Bucknell's engagement begins with the local and regional communities and extends outward with its role as a leader in global higher education.

The strategy to Build Bridges reflects the interest of Bucknell and its students in developing broad connections with the world at many levels. It suggests reaching out across space through collaborations and consortia, strategic partnerships, and community development efforts; it also provides for a wide variety of opportunities for off-campus study and sponsored student and faculty research around the globe. It encourages reaching out across time to successive generations of Bucknell alumni, building deeper and more profound lifetime relationships with the University's graduates through new alumni programming, enhanced communications, and career networks.

A commitment to Build Bridges is absolutely essential to the fulfillment of a key element of Bucknell's Mission.

Bucknell must become a global portal — a place to which the world comes each day. Through visiting scholars, international students and alumni, guest speakers, international focus semesters and other special programs, and through myriad electronic connections, students and faculty will collectively seek a disciplined understanding of our global culture and the forces that shape the events of our time.

### **Initiatives**

- Enhance meaningful student programs for off-campus study and creative learning.
- Provide diverse opportunities for students to promote social change through their interactions in the broader community.
- Establish distinctive curricular and co-curricular opportunities for students, alumni, parents, and friends to maintain ongoing and meaningful relationships with Bucknell.
- Engage Lewisburg and the region in supportive and critically reflective partnerships and enhance productive relationships with governmental agencies at all levels.
- Enhance opportunities for students and alumni to make thoughtful and informed career decisions and integrate career goals with their varied academic and life experiences.
- Advance Bucknell's strength as an employer of choice locally, regionally, and nationally.
- Establish a marketing and communications plan that supports all strategies of *The Plan for Bucknell*, including efforts to become an internationally respected and recognized leader in higher education.

## **Strategy Five: Secure Our Financial Future**

**Bucknell will secure the resources necessary to engage new opportunities, lessen its dependence on tuition, and ensure its financial future.**

### **Rationale**

Among the 50 or so top liberal arts institutions in the nation, Bucknell stands alone with the largest enrollment in the group and the broadest curricular offerings — spanning the traditional liberal arts and professional studies in education, engineering, management, and music. This ambitious commitment to provide wide curricular opportunities to 3,500 students each year is costly. The University's commitment to a diverse student body — including socioeconomic diversity — and the accompanying need for ample need-based financial aid resources — increases these costs.

Traditionally a highly tuition-dependent\* institution (73 percent), Bucknell relies on tuition and fees revenue as its primary source for supporting the education of each student. But in the interests of access, Bucknell must continually search for ways to constrain the growth of tuition in the future. This limitation places an enormous burden on the University's endowment, the second major source of institutional revenue.

Thanks to the generosity of generations of alumni and friends, and a disciplined investment strategy, Bucknell's endowment has grown significantly to a market value of \$472 million (June 30, 2005). While an impressive sum, the most accurate gauge of the effectiveness of an institution's endowment is endowment per student. Compared to our smaller competitors, Bucknell's large enrollment denominator means that less endowment is available to support improvements to the educational experience of every student. Bucknell ranked tenth within a 12-school group of peers in endowment market value per full-time equivalent (FTE)\* student as of June 30, 2005. Even within a very different group of institutions determined by their strength as admissions competitors, Bucknell ranked ninth of 12 schools in endowment per FTE student. To secure our financial future, Bucknell must move into the top quartile of peer institutions in endowment per student.

In its fall 2005 college guide, *US News & World Report*\* ranked Bucknell 42nd in financial resources among the top 50 national liberal arts colleges. Despite significant gains in many other areas of ranking over the last decade, Bucknell's financial resources rank has fallen from the mid-30s since the year 2000.

Bucknell's strategy to Secure Our Financial Future seeks to assure sufficient resources to constrain the growth in tuition and fees, provide the financial aid required to meet our recruitment and diversity goals, support initiatives to enhance the quality and effectiveness of student learning and development in and out of the classroom, weather future downturns in financial markets, and sustain the quality of the campus, human resources, and the operational infrastructure that support Bucknell's educational mission.

Secure Our Financial Future thus represents an enabling strategy that is essential to support the other strategies that speak more directly to student outcomes for learning and growth. This strategy is pursued in a comprehensive manner, through considerations of capital and operating budgets, major cost drivers, careful prioritization and resource allocation, and close integration with plans for the upcoming comprehensive fundraising campaign.

### **Initiatives**

- Broaden the base of all forms of support, especially alumni participation, with the goal of increasing the endowment per student dramatically.
- Develop a culture of philanthropy among all stakeholders, including current students, to create a sense of momentum as part of the Bucknell legacy.
- Commit to a comprehensive fee and financial aid plan that preserves access for students from diverse socio-economic circumstances.
- Address the impact of major cost drivers to restrain budget growth and ensure future efficiency.
- Link the capital and operational budgets to *The Plan for Bucknell*.
- Revise the Campus Master Plan to reflect Bucknell's changing needs.

## Plan Implementation

**In strategic planning, there is no substitute for a clear institutional vision and direction. Yet institutional focus alone is ineffectual without disciplined attention to the many facets of plan implementation. The categories of activity described below have either been initiated, or will begin immediately now that the general strategies and initiatives of *The Plan for Bucknell* have been identified. Plan implementation will begin in fall of 2006 and continue over the next decade.**

## Elaboration of Strategic Initiatives

The strategic initiatives in this plan have been described in broad and general terms. Limiting the specificity of the initiatives at this stage of planning will provide opportunities for faculty, students, staff, alumni, and parents to actively create the details that will support a successful plan.

- a) Faculty Governance Structure — Tactical planning will occur through a process that is consistent with shared university governance using deliberative governance mechanisms already in place. The engagement of faculty committees for a particular initiative will reflect areas of committee responsibility and expertise. The Faculty Council, as part of the University Council, will continue to play a pivotal role in tactical planning at a broad level. Additionally, each academic department will be involved directly in the development of an action plan (see Unit Action Plans, below).
- b) Student Governance — Bucknell Student Government (BSG) will participate in the development of tactical plans for initiatives of direct relevance and importance to students. Members of the BSG Executive Committee will continue to participate in tactical planning at a broader level through their membership on the University Council.
- c) Administrative and Support Staff — General input will be provided by the Administrative Forum and Support Staff Forum, and from the respective Personnel Committees. The most extensive and direct involvement will occur at the unit level (see Unit Action Plans, below).
- d) Special Tactical Planning Committees — Tactical planning has already been initiated by special committees in several areas: The Academic Affairs/Student Affairs Merger Task Force; The Bridge Planning Task Force (Diversity); The Campus Master Plan; and the revision of recognition and service awards.
- e) Alumni and Parents — In the development of tactical plans related to alumni and parents, the respective boards of these groups will be consulted.
- f) All Constituencies — Electronic communications will be used to consult broadly on an individual basis with all Bucknell stakeholders.

As early as fall 2005, faculty and staff were encouraged to begin thinking about tactical plans in their own areas. There will be ample time to finalize tactical plans and develop new ones during the “silent phase” that will precede the public launching of a comprehensive fundraising campaign.

## Communications Plan

Plans succeed because of the support, participation, and “buy in” of whole communities. To achieve this support, institutional communications must make both the process and the final product a “living activity” for all of Bucknell’s constituent groups. They must become familiar with the key elements of *The Plan for Bucknell*, both to provide helpful feedback and to participate in the implementation of plan initiatives. To facilitate the implementation of The Plan, the number of strategies has been limited intentionally — to five — so that everyone can remember them readily. For those employed at the University, these five familiar strategies will guide decisions — both large and small — and help individuals fulfill their job requirements within the context of the University’s plan.

Institutional strategies also serve to define Bucknell’s special niche in the educational marketplace. Communicating Bucknell’s plans to prospective students and their parents, to other institutions in the higher education community, to private foundations, corporations and government agencies, is thus another important component of the communications strategy.

Some of the initiatives identified in this document are in themselves communications plans (e.g., communications addressing the lifelong engagement of alumni with the University, and those seeking to enhance the prestige of Bucknell). These specific initiatives will be woven into the broader communications agenda.

Finally, general plans for communicating the contents of *The Plan for Bucknell* will merge with ongoing preparations for a comprehensive fundraising campaign. In particular, the case statement (or case for support) is a communications piece that will summarize in a comprehensive and compelling way the rationale for supporting particular strategic initiatives for which new funding will be sought.

The communications plan will be developed by the Chief Communications Officer, in close coordination with the Vice President for Development and Alumni Relations.

## **The Way Forward: Unit Action Plans**

Each University constituency (faculty, students, staff, alumni, and parents) will be asked to propose an action plan describing the broad tactics it will employ to support the strategies and initiatives contained in the institutional plan. Individual academic and administrative departments will also develop more specific tactical plans. Most units will find that they can contribute meaningfully to only a subset of all of the approved initiatives. For that subset, each unit will be expected to provide plans that operationalize and implement the initiative with the guidance of the Provost. Such plans will include the development of project budgets, staffing plans, information technology plans, space needs, and options to reallocate resources within a unit and/or in collaboration with another unit to optimize available resources. The Provost will forward those plans to the President who will present them to the Board of Trustees.

Senior administrators will be responsible for coordinating the creation of tactical plans among the units that report to them.

## **Timetables and Milestones**

Detailed implementation timetables will be developed for each strategic initiative. Where intermediate stages of success can be identified, milestones will also be defined and included in the timetables. This will be a second opportunity for major faculty and staff to provide significant input into the ongoing planning process.

Some of the initiatives in this plan can be pursued immediately, at least in part, with existing operating funds, or by the strategic reallocation of existing resources. Other initiatives will be more opportunistic, beginning only when new sources of funding are identified. Due to this difference in funding strategy, and the large total number of initiatives that will be pursued, particular strategic projects will be phased in at different times over the next five to seven years. As timetables for individual initiatives are developed, they will be aggregated into a master schedule that will allow a broad perspective on the number of initiatives active at any given time during the planning period.

## **Assessment Plan and Metrics**

A clear and strict principle of accountability will be applied to each and every strategic initiative. Full accountability requires careful advance consideration of the following questions:

- What does a particular initiative seek to accomplish?
- Who is responsible for the accomplishment of that initiative?
- What is the timetable by which success is expected? If there are intermediate stages of success, what are those milestones?
- What metric or metrics will be used to gauge the success of each initiative?
- What value must be achieved for each metric to consider the initiative a success? For example, will the enhancement of alumni participation be considered successful at 40 percent? At 45 percent? Or at 50 percent?

This is another key area for faculty and staff engagement in the planning process.

Given the variety of unit action plans that will be developed, metrics will be available at various levels from the local unit, to the department, to the division and the college, up to the University as a whole. The senior members of the administrative staff will be responsible for systems of assessment and accountability for all units reporting to them.

Outcomes for student learning and development will be given particular attention, as these are central to our Mission and Vision, and are also important requirements for regional accreditation and Bucknell's ability to receive federal financial aid. The assessment of student outcomes will, whenever possible, rely on multiple measures.

Once the development of the accountability phase of strategic planning is completed, the University will revise and update the Institutional Assessment Plan. All assessment activities will derive from and advance the University's highest priority strategies and initiatives, and contribute to the achievement of specifically defined student learning outcomes.

For regular reporting to the Board of Trustees on progress in achieving plan initiatives, the administration will develop a "dashboard" of carefully selected indicators that will serve to monitor the overall progress of the strategic plan. Each Board committee will have its own set of metrics, if necessary, to supplement the metrics that will be available to the whole Board.



## **Institutional Financial Plan (Operations + Capital)**

Financial planning will progress in several stages. The Office of Finance, in collaboration with appropriate department heads, will assess the general financial impact of each strategic initiative. The University should not commit to any initiative without a fundamental understanding of its resource implications — including money, staff time, information technology, facilities, and equipment. Once this initial review has been completed, the elaboration of each initiative by the appropriate departments and division will be an opportunity to fine-tune our understanding of those resource requirements. Major facilities and information technology projects require a very long lead time, and the active collaboration of various offices and constituencies. Appropriate decisions will be reached based upon priorities established and resources available. These financial and other resource requirements will then be aggregated by the Office of Finance as it develops a comprehensive institutional financial plan. The financial plan will contain expected operational and capital components, balanced budgets projected out for at least five years, and options for the funding strategy for each plan initiative (e.g., funding from operating funds, debt financing, self-borrowing from quasi-endowment, campaign financing, etc.). The specification of financial and resource requirements will begin in FY05-06 and progress through FY07-08 with the elaboration of plan initiatives. Fiscal Year 2006-07 will be a financial transition year to a budgeting approach and format that, for FY07-08, will tie capital and operational budgets to *The Plan for Bucknell*.

## **Coordination with Plans for a Comprehensive Fundraising Campaign**

There are a number of areas of intersection between the strategic planning process and the ongoing planning for Bucknell's next comprehensive campaign. Foremost, the strategies and initiatives developed in the planning process will drive the development of a campaign needs list. As noted above, the University will be able to support some strategic initiatives with existing or reallocated funds. Other initiatives will require new sources of support through the campaign. A written case statement will be developed for the initiatives on the campaign needs list, and a variety of other communications will be derived from this document. Before a public campaign goal is established, a feasibility study will be conducted to evaluate the interest in and potential support for each of the initiatives in the campaign needs list. Preparations for the *case statement* and feasibility study will begin as soon as the broad outlines of the strategic plan initiatives are clear. Detailed donor proposals for each initiative will be developed as soon as specifications for each plan initiative are completed. Campaign planning will at this stage converge with the ongoing strategic planning process, as the campaign serves as an important vehicle for implementing components of the strategic plan that are of fundamental importance to its overall success.

## Glossary

**Co-curricular** – This term refers to the complete spectrum of out-of-class, University-sponsored activities and experiences that complement the formal academic curriculum, contribute to deep personal engagement in the college experience, and foster student learning, growth and development.

**Full-Time Equivalent (FTE) Enrollment** — FTE Enrollment at Bucknell is calculated as the sum of [full-time undergraduates] + [1/3 part-time undergraduates] + [full-time graduate students] + [1/2 part-time graduate students].

**High Student Engagement** — The National Survey of Student Engagement (NSSE) was introduced in 2000 as an alternative to the resource-based rankings of *US News & World Report* (see separate Glossary entry below). NSSE assesses the extent to which colleges are engaged in practices that are known from educational research to be associated with powerful educational outcomes.

**National Liberal Arts University** — Bucknell is one of a very few institutions that combine the best characteristics of the traditional, national liberal arts colleges (very high selectivity, highly personalized education in a residential setting, a commitment to undergraduate education and the teacher-scholar model) with advantages typically seen only in larger universities (diverse curricula in both the liberal arts and professional fields, graduate studies that support and enhance the undergraduate program, and extensive co-curricular resources and opportunities). The term “national liberal arts university” best describes this distinctive niche in higher education.

**Residential Learning and Living Experience** — This phrase refers to the totality of all learning, personal growth, and development that occurs outside of the classroom in all areas of student life. It should be distinguished clearly from the **Residential Colleges**, a specific educational program.

**Residential Life** — The term “residential life” in Bucknell’s Vision is used synonymously with “residential living and learning experience” (see separate Glossary entry above). This usage should be distinguished from the **Office of Housing and Residential Life** (OHRL) at Bucknell, which is responsible for the management of and programming within the University’s residence halls and other residential spaces.

**Tuition Dependence** — [Gross Tuition and Fees Revenue] divided by [Gross Revenue – Auxiliary Revenue]. The revenues that are allocated for Financial Aid are included in both the numerator and the denominator. An alternate calculation, in which Financial Aid is excluded from both numerator and denominator, yields a current Tuition Dependence of 64 percent.

**US News & World Report** — This news magazine publishes rankings of colleges in its annual edition of “America’s Best Colleges.” Bucknell is included in the category of *Liberal Arts Colleges* (previously, *National Liberal Arts Colleges*). For fall 2005, the published rankings in this category included 215 institutions.