



## **MIDDLE STATES COMMISSION ON HIGHER EDUCATION**

Self-Study Design

Bucknell University | [May 1, 2022](#)

## I. INSTITUTIONAL OVERVIEW

Bucknell University is a private, residential, primarily undergraduate liberal arts university located in Lewisburg, Pa. Founded in 1846 as the University at Lewisburg, it is highly selective, nonsectarian and coeducational (since 1883), with a small graduate program. Bucknell offers a personalized and comprehensive education to exceptionally talented students from across the U.S. and around the world. It offers academic programs in the arts, engineering, humanities, management, and social and natural sciences as well as the creative and performing arts; facilities for professional-grade instrumentation and spaces for digital and collaborative learning; and broad opportunities outside of class.

Bucknell's 3,724 undergraduates seek degrees in 65 majors and 70 minors in the College of Arts & Sciences (63% of students), the College of Engineering (19%) and the Freeman College of Management (18%). Students in all three colleges meet academic requirements focused on the liberal arts tradition. All classes at Bucknell are taught by faculty members or professional staff. The student-faculty ratio is 9:1, with 349 full-time, tenure-line faculty.

**Mission statement.** Bucknell is a unique national university where liberal arts and professional programs complement each other. Bucknell educates students 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.

**Student population and trends.** Bucknell serves students who seek a highly personalized, residential education that is rooted in the liberal arts and provides hands-on experiences such as undergraduate research, internships, civic engagement opportunities, study abroad and more. Its undergraduates represent most states and 66 countries, and include more than 700 students of underrepresented backgrounds. Bucknell is a Division I school, with 20 percent of students participating in intercollegiate athletics. The University's Residential Colleges program, which consists of living-learning communities organized around an academic theme, engaged 38% of the first-year class in 2021. Undergraduate enrollment has been intentionally increased by 159 students since Bucknell's last self-study in 2014. At this time there is no plan to increase enrollment beyond this level.

Outcomes are strong, with 91% of first-year students returning as sophomores, and 88% of students graduating within six years. Nine months after graduation, the Class of 2020 survey indicated that, of those who responded, 94% reported being employed, in graduate school, preparing for graduate school, in the military or volunteering.

As Bucknell's national reputation has grown, it has continued to attract high numbers of applicants. The University received 11,263 applications for the Class of 2025. From those, 3,886 were accepted (35%), and 1,027 first-year students enrolled (a yield of 26.4%). Bucknell received 11,657 applications for the Class of 2026, an institutional record.

The 2021-22 comprehensive fee is \$74,676. For the same academic year, institutional aid totaling approximately \$72 million was awarded to about 53% of undergraduate students. About 61% received some form of aid, including government grants and loans, and the current discount rate is 32.57%. This represents an increase from 30.74% in 2017. Our goal is to increase the discount rate to at least 35% by fall 2025.

## Institutional Goals and Key Environmental Factors

The University in 2017 completed WE DO: The Campaign for Bucknell University, which raised \$513 million, marking the most successful comprehensive campaign in institutional history. Following this milestone, Bucknell established strategic goals that guide investments and operations on both the University and college level and ensure units across the University are working together toward clearly defined objectives.

In April 2019, after extensive community-wide discussions, Bucknell adopted *The Plan for Bucknell 2025*, which established the following four strategic University commitments:

1. Cultivating academic excellence across the institution.
2. Building and sustaining a diverse community in which all students, faculty and staff experience a sense of belonging supported by a foundation of inclusion, equity and access.
3. Providing an integrated and exemplary residential student experience.
4. Creating a sustainable future through the responsible stewardship of the University's financial, natural, human and other resources.

Each college has also established its own strategic plan, whose time frames align with *The Plan for Bucknell 2025*. These include:

- *Freeman College of Management Strategic Plan 2025* (May 2018)
- *Engineering a Better World, By Way of Bucknell: A Vision for Bucknell Engineering 2025* (November 2018)
- *The Plan for the College of Arts & Sciences 2025* (April 2021)

Additionally, recognizing the important role of civic engagement in Bucknell's campus culture and academic program, the Engaged Bucknell: Civic Action Plan 2019-2025 was approved in April 2019 to guide strategic growth in this area.

Some of our most notable accomplishments since the 2014 Middle States review are highlighted below.

**Curricular enhancements.** The University established a third academic pillar in 2017 when the former School of Management became the College of Management (now known as the Freeman College of Management). Building on more than a century of management education at Bucknell, the college has added two new management majors, Business Analytics and Management & Organizations.

The College of Arts & Sciences, too, has created new majors, in Arabic & Arabic World Studies, Biophysics, Critical Black Studies and Statistics. Additionally, the college completed full implementation of the College Core Curriculum and Integrated Perspectives courses in the 2014-15 academic year.

The College of Engineering has also continued to build upon its strong academics. In 2015, it added an Interdisciplinary Senior Design course, a selective capstone program in which engineering students collaborate across disciplines to work on real-world design challenges with corporate partners. In 2021, the college reworked its long-standing Engineering 100 course, a requirement for all first-year engineering students, to focus on themes of the Grand Challenges of the National Academy of Engineering and United Nations Sustainable Development Goals.

Like all residential institutions, Bucknell faced unexpected teaching challenges in the spring of 2020, when the COVID-19 pandemic forced abrupt changes to campus operations. Working in conjunction with Bucknell's

Library & Information Technology and Teaching & Learning Center staffs, our faculty in March 2020 successfully pivoted to complete the semester using all-remote instruction; and made necessary adjustments to operate in multiple instructional modes in 2020-21 (in-person, hybrid and remote, based on pandemic-related circumstances). Fully in-person instruction resumed in fall 2021.

**Diversity, equity and inclusion.** The University has seen moderate progress in the diversity of faculty, with initiatives underway to improve recruitment and retention, including new mentoring programs for new faculty and increased cluster hiring. We continue our efforts to increase access for students from under-represented groups by offering more need-based financial aid, with a goal of increasing our discount rate to at least 35% by fall 2025.

**Increased support for students.** As the academic and mental health needs of college students continue to grow, a trend that has gained urgency in the pandemic, the University has sought new ways to help ensure students are set up to succeed and thrive here. Examples of recent efforts include:

**Peer mentors:** Recognizing that older students can be a significant source of information and support for their younger peers, all three colleges have established peer mentorship programs for incoming first-year students. These supplement the guidance of faculty and staff and have enjoyed early success among both mentors and mentees:

- College of Arts & Sciences: Mentorship Collective
- College of Engineering: Garmin Guides
- Freeman College of Management: Freeman Fellows

**Mental health support:** Since its last Middle States review, Bucknell has strengthened its Counseling & Student Development Center offerings to better serve students. Help is available 24/7/365, and improvements include the following actions:

- Increased full-time staff from seven to 10 (since 2014)
- Moved to a new, larger space (2016)
- Added the ProtoCall program to provide after-hours support for students (2016)
- Added suicide prevention training requirement for all incoming first-year students (2019)
- Partnered with Bucknell Student Government to join Togetherall, an online peer-to-peer support community (2021)

**Technology support:** The pandemic presented unexpected teaching and learning challenges to Bucknell faculty, staff and students, all of whom had to abruptly transition to virtual instruction for the second half of the spring 2020 semester. During the 2020-21 academic year, students had the option to study either in-person or virtually; however, even those who elected in-person instruction had some remote classes, as fluctuating pandemic conditions at times necessitated a return to virtual learning. Measures to support remote learning for students included:

- A student guide to doing research remotely, as well as Zoom appointments with research librarians and research chat help
- Remote access to specialized academic software used in classes
- Provision of laptops to students in need, including those outside of the US; as well as wi-fi packs for those without a stable wireless connection off-campus

**Campus facilities.** A number of LEED-certified buildings have been constructed or renovated on Bucknell's campus in recent years, representing investments in every sector of University life:

**New academic buildings:** Academic West (2013, social sciences); Academic East (2019, engineering and education); and Holmes Hall (2021, management and art). The latter two facilities underscore Bucknell's deep commitment to interdisciplinary teaching and learning.

**Renovated academic spaces:** Hildreth-Mirza Hall (2018, home of the University's new Humanities Center); and historic Carnegie Library (2016, centralizes student support offices that include the Office of Accessibility Resources, the Teaching & Learning Center, and the Writing Center)

**New student residences and student life buildings:** South Campus Apartments and MacDonald Commons (2015, four suite-style residence halls and a student center/dining facility); and the Graham Building (2016, home of Bucknell Student Health, the Center for Student Development & Counseling, and the Bison wrestling program)

**Technology enhancements.** The University in recent years embarked on updates and upgrades to several of its key operational systems to ensure that the institution is well positioned to meet current and future needs of employees, students, alumni and parents. These include:

- Workday for Finance, Human Resources, Benefits and Payroll (2018)
- Blackbaud CRM for Advancement (2018)
- Slate CRM for Admissions (2018)
- Beacon academic early intervention system (re-instituted in 2020)

The advent of the global pandemic in March 2020 presented an unprecedented challenge to our technology staff, who played a critical role in the University's ability to quickly pivot to virtual instruction. To support the increased demands related to remote and hybrid learning modalities, the staff of Library & Information Technology teamed with the University's Teaching & Learning Center and Engineering Support Team. Together, these staff members provided solutions to ensure the continued delivery of instruction during these difficult circumstances. Highlights include:

- Instructional design and remote teaching workshops for faculty, as well as additional equipment
- Increased technology in all classrooms to accommodate remote learning
- Extension of the campus wireless network to enable outdoor instruction
- Creation of a Bucknell COVID-19 dashboard to share key statistics with the campus community (numbers of positive test results, students in isolation housing, etc.)
- Creation of a social density map of campus to encourage social distancing

**Senior management.** Since Bucknell's last Middle States Review, President John Bravman's leadership team, known as the Operations & Management Group (OMG), has expanded to include additional senior administrative positions. In addition to increasing diversity at the cabinet level, these changes reflect the University's evolving priorities, increase representation of University stakeholders and broaden expertise. These new positions include:

- Academic Deans of the three colleges
- Vice President for Human Resources



- Vice President for Strategic Initiatives
- Associate Provost for Equity & Inclusive Excellence
- Associate Vice President for Facilities

OMG also experienced transitions with the departures of three longtime leaders within the past two years — the vice presidents for enrollment management, finance & administration, and human resources. The first two positions have been filled with experienced higher education professionals, and an interim is in the third position while a national search is underway.

**Current Members of the Operations & Management Group** (with designations to note those working on MS Working Groups)

- Raquel Alexander, Dean of the Freeman College of Management
- Amy Badal, Dean of Students (Standard 4)
- Param Bedi, Vice President, Library & Information Technology (Standard 6)
- John Bravman, President
- Judith Dorsey, Interim Vice President for Human Resources
- Erin Jablonski, Interim Dean of the College of Engineering (Standard 5)
- Heather Johns, Vice President for Communications
- Lisa Keegan, Vice President for Enrollment Management
- Carol Kennedy, Executive Director of the Office of the President and University Secretary (Standard 7)
- Jeffrey Loss, Associate Vice President for Facilities
- Elisabeth Mermann-Joswiak, Provost (Standard 7)
- Robert Midkiff, Vice President for Strategic Initiatives (Standard 1)
- Eileen Petula, Vice President for Finance & Administration
- Karin Riley, General Counsel and Chief of Staff (Standard 2)
- Scott Rosevear, Vice President for University Advancement
- Jermaine Truax, Director of Athletics & Recreation
- Karl Voss, Dean of the College of Arts & Sciences
- Nikki Young, Associate Provost for Equity & Inclusive Excellence (Standard 2)

## Challenges for the Institution

While the University constantly seeks ways to strengthen the student experience, three main areas are identified as particular opportunities for continued improvement:

1. **Increasing diversity among students and faculty.** While we have made some progress in this area, we recognize that it is not enough, and that more must be done to prepare students to succeed in an increasingly diverse and global society. To ensure that Bucknell students receive an education that includes a wide variety of perspectives and lived experiences, we are building on new resources, such as diversity councils for University colleges and administrative divisions; increasing staffing to support our commitment to DEI; offering more training opportunities; and working to attract more students and employees from underrepresented backgrounds.

2. **Increasing need-based financial aid.** Ensuring that Bucknell is accessible to all talented, well-qualified students is the top priority of our new comprehensive campaign, which launched its quiet phase in July 2021 and has raised \$90 million to date. We are currently on track to exceed our goal of increasing our discount rate to at least 35% by fall 2025.
3. **Increasing retention of students.** Although Bucknell’s retention rate traditionally hovers between 92-95%, well above the national average, we recognize the importance of focusing on the 5 to 8% of students who leave the institution. Following the recommendations of the Retention Investigation Task Force (2019-20), this is being addressed through new initiatives such as Thrive (2021, which coordinates retention efforts of offices throughout the University and measures student success) and the Beacon academic early intervention system (2020).

## II. INSTITUTIONAL PRIORITIES TO BE ADDRESSED IN THE SELF-STUDY

As previously discussed, *The Plan for Bucknell 2025* articulates four broad strategic commitments for the University. To prepare for the Middle States review, President Bravman revisited these commitments, and in consultation with Bucknell’s Faculty Council, selected the following institutional priorities for our Self-Study:

1. Cultivate academic excellence across the institution.
2. Empower students to thrive at Bucknell and beyond.
3. Foster and sustain inclusive excellence.
4. Create a sustainable future.

These priorities reinforce our strategic commitments, underscoring our dedication to meeting these important challenges at all levels of University operations. They also support our mission statement and reinforce our focus on a student-centered residential educational experience that strives to develop the whole student, and prepares them to succeed in meeting their personal and professional goals in a world of increased diversity and technology, while contributing to sustainability in all its forms.

The chart below shows the alignment of these priorities with the Middle States Standards of Accreditation.

Self-Study Priorities	MSCHE STANDARDS						
	Standard I - Mission and Goals	Standard II - Ethics and Integrity	Standard III - Design and Delivery of the Student Learning Experience	Standard IV - Support of the Student Experience	Standard V - Educational Effectiveness Assessment	Standard VI - Planning, Resources and Institutional Improvement	Standard VII - Governance, Leadership and Administration
Cultivate academic excellence across the institution	A	A	P	A	A	A	
Empower students to thrive at Bucknell and beyond	A		P	P	P	A	
Foster and sustain inclusive excellence	A	A	P	P			A
Create a sustainable future	P	P				P	P

**P = Primary focus; A = Additional focus**

### III. INTENDED OUTCOMES OF THE SELF-STUDY

Bucknell seeks the following outcomes from the Self-Study process:

- To be re-accredited by the Middle States Commission on Higher Education by demonstrating that we meet the Commission's Standards for Accreditation and Requirements of Affiliation.
- To reaffirm our commitment to continuous improvement.
- To use an inclusive and transparent process that actively seeks the involvement of members from all areas of the institutional community.
- To identify areas of strength and opportunities for improvement.
- To lay some of the groundwork for our next strategic plan.

### IV. SELF-STUDY APPROACH

To address all Standards thoroughly within the Self-Study, Bucknell has selected a Standards-based approach. Each Standards-based working group has been assigned to concentrate its efforts on one Standard and related requirements of affiliation. The above institutional priorities will be used to focus our institutional reflection as we demonstrate compliance with the Standards, assess achievement of *The Plan for Bucknell 2025*, and identify opportunities for improvement and innovation.

### V. ORGANIZATIONAL STRUCTURE OF THE STEERING COMMITTEE AND WORKING GROUPS

Our 11-member Steering Committee is composed of the Self-Study Leadership Team, the Provost and the administrative co-chairs of the seven Working Groups. Each Working Group also has a faculty co-chair. Working groups are instructed to consult broadly with offices, committees and knowledgeable individuals across the institution. The Leadership Team will serve as an information hub to promote coordination and efficiency among the Working Groups. Our Working Groups are organized and numbered by Standard.

The Self-Study Steering Committee is composed of the following individuals:

- Tom Cassidy, Co-Chair and Professor of Mathematics
- Kevork Horissian, MSCHE Liaison Officer and Assistant Provost for Institutional Research & Assessment
- Jan Knoedler, Co-Chair and Professor of Economics
- Elisabeth Mermann-Jozwiak, Provost and Professor of English
- Christina Wallace, Director of Executive & Internal Communications
- Robert Midkiff, Vice President for Strategic Initiatives (Standard 1)
- Karin Riley, General Counsel and Chief of Staff (Standard 2)
- Ghislaine McDayter, Associate Provost for Research & Creative Inquiry and Professor of English (Standard 3)
- Amy Badal, Dean of Students (Standard 4)
- JiaJia Dong, Associate Dean, Natural Sciences & Math and Professor of Physics & Astronomy (Standard 5)



- Param Bedi, Vice President for Library & Information Technology (Standard 6)
- Carol Kennedy, Executive Director of the Office of the President and University Secretary (Standard 7)

The Self-Study Leadership Team is a subset of the Steering Committee and will manage the Self-Study process.

- Tom Cassidy, Co-Chair and Professor of Mathematics
- Kevork Horissian, MSCHE Liaison Officer and Assistant Provost for Institutional Research & Assessment
- Jan Knoedler, Co-Chair and Professor of Economics

Working Groups will be most active over the course of the 2022-23 academic year. During the summer and fall of 2023, the Self-Study Leadership Team, working together with the Steering Committee, will compile the various draft contributions, and through an iterative process refine the whole into an integrated discussion around our institutional priorities. As Self-Study drafts become ready for presentation, the Steering Committee will share them across the campus community for comments.

### **General Charge for All Working Groups:**

Each Working Group will do the following:

1. Develop an understanding of the Middle States Standards for Accreditation and Requirements of Affiliation and of the criteria under the Standard assigned to your Working Group. Give special attention to the final assessment criteria of each Standard. Review the 2014 Self-Study in order to become aware of past successes and challenges in meeting previous accreditation standards.
2. Hold regular (at least monthly during the academic year, more as needed) meetings, beginning in February 2022, to identify, collect and analyze evidence, and to draft reports for the Steering Committee in accordance with the established timetable.
3. Keep minutes of all meetings, to be stored on Google Drive. During the 2022-23 academic year, Professor Karen Morin will assist Working Groups with record-keeping.
4. By June 1, 2022, use the Initial Examination template to craft a short summary relative to your Standard and identify sources of information and relevant data. For each of the criteria listed under your Standard, provide brief answers. Some answers may be simply “yes” along with a reference to the most relevant evidence to support the assertion. You might not have an assessment example for every criterion, but be certain to include some examples for the Standard overall. Make note of data, policies or documents that are missing or incomplete. Any shortcomings that the Working Group cannot satisfactorily address directly should be noted and communicated to the Self-Study co-chairs even before the Initial Summary is due. Use the Google doc for your Standard as the common work space for the Initial Examination. This document will be visible only to members of the various working groups and Self-Study leadership.
5. Collaborate with other Working Groups, governance bodies, designated consultants and key offices to address the Specific Lines of Inquiry, to identify gaps in the evidence or in processes and procedures, to develop strategies addressing these gaps and to implement these strategies where feasible. Identify the gaps early in the process along with suggested resolutions.
6. Using information gathered in step five, along with feedback from the Steering Committee, prepare the Gap Analysis and Emerging Recommendations document. These include preliminary

findings organized by the Standard's criteria, a summary of what's missing at this point, and any recommendations likely to be included in the Final Report, along with a refined Evidence Inventory. Templates for the Gap Analysis will be provided. A draft of this document is due by Oct. 15, 2022; the final version is due by Dec. 15, 2022.

7. By the end of the 2022-23 academic year, each Working Group will submit a Final Report of 12-15 pages. A template and style guide will be provided. Your report will be made public on the Self-Study website. The report will demonstrate compliance with the relevant Middle States Standards of Accreditation and Requirements of Affiliation. It is vital that the report address each of the criteria listed for the relevant Standard.

Demonstrating compliance will involve adducing evidence (policy documents, analyses, data sets, minutes) and creating an analytical narrative explanation of how these items show that we meet the given criteria. On the basis of the evidence collected and analyzed, the report will assess institutional strengths and weaknesses in relation to the Standard, identify areas of distinction, and suggest opportunities for improvement and institutional renewal — linking these opportunities to the Institutional Priorities. The report will include:

- An overview of how the Working Group addressed criteria in light of the institutional priorities they considered.
- The findings on compliance with the Standard, including an explanation of how we meet each criterion, with citation of the most relevant evidence from our documents, and noting any gaps that remain between the criteria and our current practices.
- Analytical discussion identifying both our strengths and challenges, articulating our assessment approach for this Standard, and providing concrete examples of assessment in action for institutional improvement.
- Recommendations (if any) for institutional improvement and innovation related to the priorities of our Self-Study (academic excellence, student thriving, inclusive excellence and sustainability). A limited number of recommendations will be put forth in the final narrative, and we will report our progress on these in our next Self-Study in 2032. Not all Working Group recommendations will find their way into the final version of the Self-Study Report. However, the comprehensive set of recommendations will be important to discussions as we begin to formulate a strategic plan beyond 2025.
- Suggestions for improvement or small projects that would support innovation. These might be things that are already underway, but are ripe for further action. These will be compiled as an outcome of the Self-Study process and referred to existing processes or governance bodies for appropriate consideration and action. We will not be expected to report formally on our progress on these as part of our subsequent Self-Study in 2032.

Submit a draft of the report by March 15, 2023. Submit a final draft of the report by May 31, 2023.

8. The Working Groups should recognize that their submitted reports will be used as source information for the Self-Study document, and may or may not appear in their submitted form in that final document.
9. As the Steering Committee merges the individual Working Group reports into a single coherent Self-Study, Working Groups should be available to discuss revisions during the fall of 2023.

## Document Management

The Self-Study website and the Self-Study Google Drive folder are the key resources for managing the work of the Self-Study. The website will be used for communicating with Bucknell's community, and the Google Drive will be used to manage the work of the Steering Committee and the Working Groups.

Each Working Group should save their minutes, report drafts and drafts of the gap analysis to the group folder under the folder named Self-Study. Access to these folders will be limited to members of the Middle States Working Groups and the Steering Committee, who will all be able to view these folders.

The evidence specific to each standard will be saved in the specific Working Groups subfolder under the Evidence Inventory folder. In addition to the evidence inventory folders for each group, there will be two sub-folders with documents and data that may be applicable to all Working Groups. They are named General Evidence and Dashboards and will have evidence such as the student, faculty and staff handbooks, *The Plan for Bucknell 2025*, the University Fact Book, institutional mission statement, etc.

## SPECIFIC CHARGES AND MEMBERSHIP FOR THE SEVEN WORKING GROUPS

### Working Group 1: Mission and Goals

#### STANDARD I: Mission and Goals

“The institution’s mission defines its purpose within the context of higher education, the students it serves, and what it intends to accomplish. The institution’s stated goals are clearly linked to its mission and specify how the institution fulfills its mission.” (MSCHE, 2015)

**Requirements of Affiliation:** 7. Mission and Goals, 10. Institutional Planning

**Related Institutional Priorities:** Create a sustainable future (Primary Focus); cultivate academic excellence across the institution; empower students to thrive at Bucknell and beyond; foster and sustain inclusive excellence

#### **Co-Chairs:**

- Keith Buffinton, Professor of Mechanical Engineering
- Robert Midkiff, Vice President for Strategic Initiatives

#### **Other Members:**

- Mihai Banciu, Associate Dean of Faculty, Freeman College of Management, and Associate Professor of Analytics & Operations Management
- Nancy Frazier, Instructional Services Librarian
- Michelle Johnson, Associate Dean of Faculty, Social Science, and Professor of Anthropology
- Carol White, Professor of Religious Studies

#### **Specific Lines of Inquiry:**

1. How do Bucknell’s Mission and Goals remain appropriate?
2. How are the Mission and Goals developed collaboratively to address all key stakeholders, and how are they approved by an appropriate governing body?
3. How do the Mission and Goals guide decision-making for planning, resource allocation, program and

- curricular development, and related institutional and educational outcomes?
4. How are the Mission and Goals communicated broadly and periodically evaluated?
  5. To what extent are the Goals realistic and supported by administration, educational and student support programs?

**This working group will consult with:** President’s Diversity Council; President’s Sustainability Council; curriculum committees in the three colleges; Faculty Development Committee; Operations & Management Group; Bucknell Student Government; Committee on Campus & Student Life

**Assessment data, processes, documents and procedures to support the Self-Study Report —**  
*Examples include:*

- *The Plan for Bucknell 2025*
- Metrics for the Strategic Plan
- Documentation that Shows the Board of Trustees’ Approval of the Mission and Resolution for Approval of *The Plan for Bucknell 2025*
- Board of Trustees Bylaws
- Bucknell Educational Goals
- Bucknell’s Strategic Planning Website
- Faculty Handbook
- Mission, Guiding Principles and Institutional Expected Student Learning Outcomes
- Statement for Job Postings
- Bucknell University Institutional Effectiveness Plan
- Office of Institutional Research & Planning Dashboards
- Examples of Communication of Mission, Goals and Learning Goals
- Annual Reports from Enrollment, Library & Information Technology, Advancement, Human Resources, Facilities, Communications and Finance
- College of Arts & Sciences Strategic Plan and Assessment — mapping to *The Plan for Bucknell 2025*
- College of Engineering Strategic Plan and Assessment — mapping to *The Plan for Bucknell 2025*
- Freeman College of Management Strategic Plan and Assessment — mapping to *The Plan for Bucknell 2025*
- Student Affairs Strategic Plan and Assessment — mapping to *The Plan for Bucknell 2025*
- Civic Engagement Strategic Plan and Assessment — mapping to *The Plan for Bucknell 2025*
- DEI Strategies, Initiatives and Assessment — mapping to *The Plan for Bucknell 2025*
- Peer and Aspirant Institutions — List and Dashboard
- Economic Impact — Completed by the Association of Independent Colleges and Universities of Pennsylvania (AICUP)
- Committee on Instruction — Charge and Annual Reports
- Curriculum Committees — Charge and Annual Reports
- Course Catalog

## Working Group 2: Ethics and Integrity

### STANDARD II: Ethics and Integrity

“Ethics and integrity are central, indispensable, and defining hallmarks of effective higher education institutions. In all activities, whether internal or external, an institution must be faithful to its mission, honor its contracts and commitments, adhere to its policies, and represent itself truthfully.” (MSCHE, 2015)

**Requirements of Affiliation:** 5. Compliance with Government Laws, 6. Compliance with Commission Policies, 12. Governance Structures, 13. Governing Body, 14. Accurate Information

**Related Institutional Priorities:** Create a sustainable future (Primary Focus); cultivate academic excellence across the institution; foster and sustain inclusive excellence

#### Co-Chairs:

- Aaron Mitchel, Associate Professor of Psychology
- Karin Riley, General Counsel and Chief of Staff

#### Membership:

- Marcia Cooney, Executive Director of Human Resources
- Kevin Mathes, Dean of Admissions
- David Mitchell, Associate Professor of International Relations
- Nikki Young, Associate Provost for Equity & Inclusive Excellence and Associate Professor of Women’s & Gender Studies and Religion

#### Specific Lines of Inquiry:

1. How does the institution demonstrate a commitment to academic freedom, intellectual freedom, freedom of expression and respect for intellectual property rights?
2. How does the institution establish a climate that fosters respect among students, faculty, staff and administration from a range of diverse backgrounds, ideas and perspectives?
3. What policies, procedures and practices are in place to assure fair and impartial treatment of constituencies in all aspects of operations, to address complaints and grievances, to avoid conflicts of interest, and to communicate with honesty and integrity with all constituencies?
4. How does the institution honor and monitor its contracts (including third-party)? Are clear lines of responsibility defined, including the role of the Board of Trustees?
5. How does the institution comply with all applicable federal, state and Commission reporting policies, regulations and requirements, including those items in the Verification of Compliance?
6. How does the institution periodically assess ethics and integrity as evidenced in institutional policies, processes and practices, and the manner in which these are implemented?

**This group will consult with:** Committee on Academic Freedom and Tenure; Committee on Admissions & Financial Aid; Faculty Hearing Committee; Institutional Review Board; University Review Committee; Board of Review; Human Resources; Committee on Faculty & Academic Personnel; Communications; Office of Accessibility Resources; Title IX Coordinator; Associate Dean, Student Health & Wellness; colleagues involved with copyright and software licensing; Office of Sponsored Projects

## **Assessment data, processes, documents and procedures to support the Self-Study Report —**

*Examples include:*

- Systematic Review of Board Policies
- Financial Aid Information
- Conflict of Interest Policy
- Privacy Policy
- Grievance Procedures
- Hiring Procedures
- Promotion and Tenure Policy and Procedures
- Remediation of Non-Compliance Issues
- Campus Climate Survey
- 2021 Institutional Profile
- Verification of Compliance Report
- Consumer Information Page
- Student Surveys
- Freedom of Speech Policies
- Policies on Student Complaints about Grades and Other Matters
- Copyright and Trademark Policies
- Course Catalog
- Examples of Communications to Students, Faculty and Staff
- Title IX Compliance Documentation
- Policy on Requesting Accommodations of Disabilities by Students
- Academic Policies
- Staff Handbook
- Faculty Handbook
- Code of Student Conduct
- Whistleblower Protection Policy
- Conflict of Interest Disclosure and Confidentiality Disclosure
- Faculty Hiring Guide
- Staff Hiring Guide
- Human Resources Policies — Equal Employment, Americans with Disabilities Act, Bias, Non-Discrimination, etc.
- Performance Evaluation Policy
- Collaboration with Admissions and Communications with the Office of Institutional Research & Planning for Reporting Accurate Data
- University Fact Book and Fact Sheet
- Post-Graduation Placement Survey Report, College Guides, Various Rankings, etc.
- Cost of Attendance Calculator



- Financial Aid Website and Policies
- Admissions — Relevant Information
- BU Consumer Information Webpage
- Verification of Compliance Document — MSCHE
- *The Plan for Bucknell 2025*
- Consumer Information Webpage
- The Integrated Postsecondary Education Data System (IPEDS) — Retention and Graduation Surveys
- MSCHE Annual Institutional Updates (AIU)
- Internal Audits
- Climate Surveys
- Student Surveys
- Review of Board of Trustees Policies
- Review of Other Policies

### Working Group 3: Design and Delivery of the Student Learning Experience

#### STANDARD III: Design and Delivery of the Student Learning Experience

“An institution provides students with learning experiences that are characterized by rigor and coherence at all program, certificate, and degree levels, regardless of instructional modality. All learning experiences, regardless of modality, program pace/schedule, level, and setting are consistent with higher education standards.” (MSCHE, 2015)

**Requirements of Affiliation:** 8. Systematic Evaluation of Programs, 9. Student Learning Programs, 10. Institutional Planning, 15. Faculty

**Related Institutional Priorities:** Cultivate academic excellence across the institution; empower students to thrive at Bucknell and beyond; foster and sustain inclusive excellence (all Primary Focus)

#### Co-Chairs:

- Ghislaine McDayter, Associate Provost for Research & Creative Inquiry and Professor of English
- Le Paliulis, Herbert L. Spencer Professor of Biology

#### Other Members:

- Matt Bailey, Christian R. Lindback Chair in Business Administration and Professor of Analytics & Operations Management
- Jane Grassadonia, Associate Dean of Students, Living, Learning & Leadership
- Dustyn Martincich, Associate Professor of Theatre & Dance
- Jessica Newlin, Associate Professor of Civil & Environmental Engineering

#### Specific Lines of Inquiry:

1. How are the institution’s academic programs designed to foster a coherent student learning experience and promote synthesis of learning?
2. To what degree are student learning experiences designed, delivered and assessed by faculty and/or

other appropriate professionals who demonstrate effectiveness of professional responsibilities, hold requisite qualifications, are sufficient in number, engage in professional growth and are evaluated regularly?

3. Are academic programs of study clearly and accurately described in official publications of the institution in a way that students are able to understand and follow degree and program requirements and expected time to completion?
4. What learning opportunities and resources are provided by the institution to support both programs of study and students' academic progress?
5. In what ways does the general education program sufficiently offer new areas of intellectual experience, expand their cultural and global awareness and cultural sensitivity, prepare students to make well-reasoned judgments and develop general skill areas?
6. If Bucknell employs any third-party providers, what are the assessment outcomes of these student learning opportunities?
7. How does the institution periodically assess the effectiveness of programs providing student learning opportunities?

**This group will consult with:** the three College Curriculum Committees; the Student-Facing Associate Deans in the three colleges; Writing Center and Teaching & Learning Center; University Committee on Instruction; Office of Global and Off-Campus Education; Office of Fellowship and Undergraduate Research; Office of Civic Engagement; Office of Accessibility Resources; College of Arts & Sciences College Core Curriculum Coordinator; Freeman Fellows, Garmin Guides and Mentorship Collective Mentors; Undergraduate Executive Interns; Bucknell Student Government; Honors Council; Library & Information Technology; Residential Colleges; College of Engineering Student Advisory Board and Freeman College of Management Student Advisory Board; Presidential Fellows Steering Committee

**Assessment data, processes, documents and procedures to support the Self-Study Report** —  
*Examples include:*

- *The Plan for Bucknell 2025*
- Bucknell Educational Goals
- Bucknell's Strategic Planning Website
- Bucknell Outcomes Website
- Integrated Postsecondary Education Data System (IPEDS) Degrees Conferred
- Course Catalog, including departmental goals
- Faculty Handbook
- Teaching & Learning Center Mission and Activities
- Student Learning Dashboard
- Annual Report of College of Arts & Sciences Assessment Activities
- Faculty and Staff Performance and Merit Review Processes
- Faculty Hiring Guide
- Integrated Postsecondary Education Data System (IPEDS) Human Resources Survey
- Common Data Set — Faculty Info

- Global & Off-Campus Education
- Center for Civic Engagement
- Undergraduate Research and Creative Projects
- College Core Curriculum Assessment
- Accrediting Board of Engineering and Technology (ABET) Goals
- The Association to Advance Collegiate Schools of Business (AACSB) Goals
- Departmental Annual Reports
- Template for Department Annual Assessment Reports
- Rubric for Evaluating the Department Annual Assessment Reports
- Policies on Curriculum Governance — Course Approval, Program Approval, Major Approval
- Learning Outcomes Dashboard
- National Institute for Learning Outcomes Assessment NILOA and American Association of College & Universities (AACU) Designation of Excellence in Assessment
- Bucknell Dashboards — Academic, Thrive Metrics, Course and College Core Curriculum
- Program Reviews
- Program Review Guides — Academic and Support Units
- Guide for Centers and Institutes
- National Association of Schools of Music (NASM), Pa. Department of Education, American Chemical Society (ACS), Computer Sciences Accreditation Board (CSAB) accreditation documents
- Schedule for External Program Reviews

## Working Group 4: Support of the Student Experience

### STANDARD IV: Support of the Student Experience

“Across all educational experiences, settings, levels, and instructional modalities, the institution recruits and admits students whose interests, abilities, experiences, and goals are congruent with its mission and educational offerings. The institution commits to student retention, persistence, completion, and success through a coherent and effective support system sustained by qualified professionals, which enhances the quality of the learning environment, contributes to the educational experience, and fosters student success.” (MSCHE, 2015)

**Requirements of Affiliation:** 8. Systematic Evaluation of Programs, 9. Student Learning Programs, 10. Institutional Planning, 15. Faculty

**Related Institutional Priorities:** Cultivate academic excellence across the institution; empower students to thrive at Bucknell and beyond; foster and sustain inclusive excellence (all Primary Focus)

#### Co-Chairs:

- Amy Badal, Dean of Students
- Collin McKinney, Associate Professor of Spanish

**Other Members:**

- Denelle Brown, Associate Dean of Students, Diversity & Inclusion
- Sally Koutsoliotas, Professor of Physics
- Steve Jordan, Professor of Biology
- Jen Kentera, Senior Associate Athletics Director, Leadership Development
- Tim Kracker, Registrar
- Joe Tranquillo, Associate Provost, Transformative Teaching & Learning, and Professor of Biomedical Engineering

**Specific Lines of Inquiry:**

1. Does the institution have clearly stated ethical policies and processes for admissions, financial aid, retention, supporting underprepared students and student achievement?
2. What policies and procedures are used to evaluate and accept transfer credits and credits awarded through various learning approaches?
3. What policies and procedures are used for the safe and secure maintenance and appropriate release of student information and records?
4. What academic, fiscal and administrative principles and procedures govern athletics, student life and other extracurricular activities?
5. What are the assessment outcomes of any student support services?
6. How does the institution periodically assess the effectiveness of programs supporting the student experience?

**This group will consult with:** various Student Affairs offices; Bucknell Student Government; other student groups; Office of Accessibility Resources; Athletics; Registrar; Admissions; College of Arts & Sciences College Core Curriculum Coordinator; Committee on Campus & Student Life; Office of Civic Engagement; Center for Career Advancement; Residential Colleges; Student-Athlete Advisory Committee

**Assessment data, processes, documents and procedures to support the Self-Study Report** —  
*Examples include:*

- Orientation and First-Year Programs and Assessments
- Retention and Graduation Rates
- Thrive at Bucknell
- Consumer Information Webpage
- Policies: Registration, Grade Dispute, Grading, Graduation, Academic Standing, Refund of Tuition and Fees
- Bucknell Financial Aid Website
- Course Catalog
- Admissions Materials
- Enrollment Trends — Fact Book
- Math ALEKS Assessment
- Office of Institutional Research & Planning Predictive Models

- Accessibility Resources
- Student Orientation
- Foundation Seminars
- Student Advising Documentation
- Credit Transfer Policies
- Bucknell Verification of Compliance Report
- Registrar’s Office Policy
- Data Request and Reporting Policy
- External Requests for Research Policy
- Privacy Statement
- Student Disciplinary Records Retention Policy
- Student Educational Records
- The Family Educational Rights and Privacy Act (FERPA)
- Records Retention Policy
- Research Involving Human Subjects/Institutional Review Board
- Responsible Use of Computing Technology
- Internet Privacy Policy
- Transcript Policy
- Athletics Teams
- Civic Engagement
- Club Sport Manual 2020-21
- Fraternity & Sorority Policies
- Outdoor Leadership & Education
- Photography Release
- Student Handbook
- Social Media Policy
- Sportsmanship & Dispute Resolution Form
- Student-Athlete Handbook
- Student Clubs & Organizations
- Student Travel Activities
- Student Affairs Departments — Annual Assessment Reports and Program Reviews
- Thrive at Bucknell Dashboard
- MyVoice survey, National Survey of Student Engagement (NSSE) survey, Your first College Year (YFCY) Survey, Higher Education Research Institute (HERI) Senior Surveys
- Teaching & Learning Center, Tutoring Library and Information Technology
- Measuring Information Service Outcomes (MISO) Library & Information Technology survey

## Working Group 5: Educational Effectiveness Assessment

### STANDARD V: Educational Effectiveness Assessment

“Assessment of student learning and achievement demonstrates that the institution’s students have accomplished educational goals consistent with their programs of study, degree level, the institution’s mission, and appropriate expectations for institutions of higher education.” (MSCHE, 2015)

**Requirements of Affiliation:** Systematic Evaluation of Programs, 9. Student Learning Programs, 10. Institutional Planning

**Related Institutional Priorities:** Empower students to thrive at Bucknell and beyond (Primary Focus); cultivate academic excellence across the institution

#### Co-Chairs:

- Jiajia Dong, Associate Dean, Natural Sciences & Math and Professor of Physics & Astronomy
- Eric Santanen, Associate Professor of Information Systems

#### Other Members:

- Kim Councill, Professor of Music
- Erin Jablonski, Interim Dean, College of Engineering
- Kevork Horissian, Assistant Provost, Institutional Research & Assessment
- Jeff Langford, Associate Professor of Mathematics

#### Specific Lines of Inquiry:

1. Are institution’s educational goals at the program and institution level interrelated and linked to the mission?
2. Does the institution have a comprehensive assessment of the student learning plan and use results for improvement of educational effectiveness consistent with the mission?
3. What are the assessment outcomes of any assessment services provided by third-party providers, if applicable?
4. How does the institution periodically assess the effectiveness of assessment processes?

**This working group will consult with:** Curriculum Committees in the three colleges; Council of Chairs in Freeman College of Management and College of Engineering; College of Arts & Sciences department chairs, by division; assessment committees in the three colleges; Committee on Instruction

#### Assessment data, processes, documents and procedures to support the Self-Study Report —

*Examples include:*

- Annual Assessment Plans
- CCC Assessment Reports
- Curriculum Mapping
- Relevant Academic Policies
- Assessment Dashboard
- Guides for Academic Program Reviews and Centers and Institutes



- [Annual State of Assessment Report](#)
- [Faculty Handbook](#)
- [Assessment Council](#)
- [Assessment Resources](#)
- [Bucknell Educational Goals](#)
- [Departmental Goals in the Catalog](#)
- [College Core Curriculum Assessment](#)
- [Accrediting Board of Engineering and Technology \(ABET\) Goals](#)
- [The Association to Advance Collegiate Schools of Business \(AACSB\) Goals](#)
- [National Institute for Learning Outcomes Assessment \(NILOA\) and American Association of College & Universities \(AACU\) Designation of Excellence in Assessment](#)
- [Departmental Annual Reports](#)
- [Template for Department Annual Assessment Reports](#)
- [Rubric for Evaluating the Department Annual Assessment Reports](#)
- [Policies on Curriculum Governance — Course Approval, Program Approval, Major Approval](#)
- [National Survey of Student Engagement \(NSSE\)](#)
- [Career Placement Dashboard, Career Paths, Outcomes Webpage](#)
- [Departmental Webpages and Brochures](#)
- [Office of Institutional Research & Planning Services and Resources](#)
- [Moodle Assessment Page](#)
- [Campus Labs — Repository of Reports](#)
- [Annual Report of College of Arts & Sciences Assessment Activities](#)
- [Student Learning Dashboard](#)
- [Office of Institutional Research & Planning Workshop](#)
- [Office of Institutional Research & Planning Assessment Moodle Page](#)
- [Office of Institutional Research & Planning Office Hours](#)
- [Assessment Webpage](#)
- [Assessment Consultations](#)
- [Assessment Council/Committee on Assessment](#)
- [Office of Institutional Research & Planning Survey Research Page, Survey Research Primer](#)
- [Teaching & Learning Center](#)
- [Academic Affairs Webpages](#)
- [Office of Institutional Research & Planning Website](#)
- [Student Outcomes Website](#)
- [Student Success Dashboard](#)
- [Retention and Graduation Rates Dashboard](#)
- [Career Placement Dashboard, Career Paths, Outcomes Webpages](#)
- [Committee on Instruction — Annual Reports](#)
- [Advising Committee — Annual Reports](#)

- Program Reviews
- Program Review Guides — Academic and Support Units
- Guide for Centers and Institutes
- National Association of Schools of Music (NASM), Pa. Department of Education, American Chemical Society (ACS), Computer Sciences Accreditation Board (CSAB) accreditation documents
- Accrediting Board of Engineering and Technology (ABET) Goals
- The Association to Advance Collegiate Schools of Business (AACSB) Goals
- Template for Assessment Reports
- Rubric for Evaluating the Reports
- Schedule for External Program Reviews

## Working Group 6: Planning, Resources and Institutional Improvement

### STANDARD VI: Planning, Resources and Institutional Improvement

“The institution’s planning processes, resources, and structures are aligned with each other and are sufficient to fulfill its mission and goals, to continuously assess and improve its programs and services, and to respond effectively to opportunities and challenges.” (MSCHE, 2015)

**Requirements of Affiliation:** 8. Systematic Evaluation of Programs, 10. Institutional Planning, 11. Financial Resources

**Related Institutional Priorities:** Create a sustainable future (Primary Focus); cultivate academic excellence across the institution; empower students to thrive at Bucknell and beyond

#### Co-Chairs:

- Param Bedi, Vice President for Library & Information Technology
- J.T. Ptacek, Professor of Psychology

#### Other Members:

- Pam Benfer, Director of Academic Finance & Operations, Provost’s Office
- Marcia Cooney, Executive Director, Human Resources
- Andrea Halpern, Professor of Psychology
- Kevork Horissian, Assistant Provost, Institutional Research & Assessment
- Heather Johns, Vice President for Communications
- Lisa Keegan, Vice President for Enrollment Management
- Jeff Loss, Associate Vice President for Facilities
- Abbey Scheckter, Director of Annual Fund Individual Giving
- Betsy Stewart, Associate Vice President for Finance, Treasurer and Controller

#### Specific Lines of Inquiry:

1. Are institutional objectives clearly stated, assessed appropriately, linked to mission and goal achievement, reflective of conclusions drawn from assessment results, and used for planning and resource allocation?

2. Are planning and improvement processes clearly documented and communicated?
3. How do planning and improvement processes include broad constituent participation and incorporate the use of assessment results?
4. How is the financial planning and budgeting process aligned with the institution's mission, goals and strategic plans/objectives?
5. How do the institution's financial, human, physical and technological resources adequately support its operations?
6. Are decision-making processes well-defined with clear assignment of responsibility and accountability?
7. How does the institution engage in comprehensive planning for facilities, infrastructure and technology linked to the institution's strategic and financial planning processes?
8. Is an annual independent audit confirming financial viability with evidence of follow up on any concerns cited in the audit's accompanying management letter?
9. What strategies exist to measure and assess the adequacy and efficient utilization of institutional resources required to support the institution's mission and goals?
10. How does the institution periodically assess the effectiveness of planning, resource allocation, institutional renewal processes and availability of resources?

**This working group will consult with:** University Committee on Planning & Budget; Committee on Staff Planning; Provost's Office; President's Office; Finance; Facilities; Human Resources; Operations & Management Group; Library & Information Technology

**Assessment data, processes, documents and procedures to support the Self-Study Report** —  
*Examples include:*

- Strategic Plan Commitments
- Annual Reports — Enrollment, Library & Information Technology, Advancement, Human Resources, Facilities, Communications, Finance, DEI
- Centers and Institutes Annual Reports
- Program Reviews Examples
- Diversity Plan and Annual Reports
- Diversity Dashboard
- Strategic Plan Timeline and Annual Priorities
- Strategic Planning Annual Reports
- Strategic Planning Dashboard
- Strategic Plan Commitments' Impact on Budget Decisions
- Policies on Adopting Annual Budgets Including Capital Budget
- Description of Budget Process
- Equal Employment Opportunity Policy
- Affirmative Action Policy
- Background and Credentials Checks Policy
- Compensation Policy

- Use of Computer Technology Policy
- Two Most Recent Externally Audited Financial Statements
- Facilities Report
- Campus Master Plan
- Policy for Use of Facilities by Internal and External Constituents
- Library & Information Technology Report
- Forbes Financial Grade
- Enrollment and Budget Projections
- Budget Memo
- Information Technology Memo — Computer and Technology Requests
- Capital Budget Memo
- Enrollment Plan
- University Organizational Chart
- Provost’s Office Organizational Chart
- Policies on Purchasing, Signing, Contracts, Reimbursement, Travel, Hiring, etc.
- Board of Trustees Meetings Minutes and Summaries
- Facilities Reports or Master Plan
- Financial Planning Documentation
- Audited Financial Statements
- Financial Projections for the Next Two Years
- Student Outcomes Page
- Post-Graduation Report
- National Survey of Student Engagement Report
- MyVoice Survey and Reports
- Strategic Planning Dashboard
- University Fact Book
- Peer Comparison Dashboard
- Rankings Dashboard
- Committee on Staff Planning Guidelines for Replacement and New Positions

## **Working Group 7: STANDARD VII: Governance, Leadership and Administration**

### **STANDARD VII**

Governance, Leadership and Administration “The institution is governed and administered in a manner that allows it to realize its stated mission and goals in a way that effectively benefits the institution, its students, and the other constituencies it serves. Even when supported by or affiliated with governmental, corporate, religious, educational system, or other unaccredited organizations, the institution has education as its primary purpose, and it operates as an academic institution with appropriate autonomy.” (MSCHE, 2015)

**Requirements of Affiliation:** 7. Mission and Goals, 10. Institutional Planning

**Related Institutional Priorities:** Create a sustainable future (Primary Focus); foster and sustain inclusive excellence

**Co-Chairs:**

- Carol Kennedy, Executive Director, Office of the President and University Secretary
- Bill Kenny, Professor of Music

**Other Members:**

- Kari Conrad, Associate Dean of Students, Campus Activities & Programs
- Coralynn Davis, Professor of Women’s & Gender Studies, and Chair of the Faculty
- Elisabeth Mermann-Jozwiak, Provost and Professor of English
- Erika Stanat, Chair of the Board of Trustees Nominating & Governance Committee
- Kristin Stetler, Chair of University Staff Forum

**Specific Lines of Inquiry:**

1. Does the institution have a clearly articulated and transparent governance structure?
2. Does the institution have a legally constituted governing body with clearly defined roles and responsibilities for oversight?
3. Does the institution have a Chief Executive Officer and sufficient Administration who have appropriate experience, skills and credentials; clearly defined roles and reporting relationships; appropriate resources and working relationships; and processes for evaluation?
4. How does the institution periodically assess the effectiveness of governance, leadership and administration?

**This working group will consult with:** Bucknell Student Government; Ad Hoc Committee Reviewing Shared Governance; Faculty Council; Office of the President; Board of Trustees; Provost’s Council; Operations & Management Group; Human Resources; General Counsel; University Staff Personnel Committee; Human Resources

**Assessment data, processes, documents and procedures to support the Self-Study Report —**

*Examples include:*

- Board of Trustees Minutes and Biographies
- Organizational Chart
- Institution Bylaws
- Administrative Credentials
- Conflict of Interest Statement
- Board Surveys
- Board Self-Assessment
- Faculty Council Bylaws
- Policy on Policies
- Higher Education Research Institute (HERI) Faculty Survey

- Board of Trustees Bylaws
- Faculty Constitution and Bylaws
- Bucknell Student Government
- Board of Trustees Committees — Roles and Responsibilities
- University Organizational Chart
- Provost’s Organizational Chart
- Faculty Committees and Charges
- Board of Trustees Conflict of Interest Disclosure
- Annual Staff Performance Evaluations
- Faculty Handbook
- Financial and Governing Policies
- Top Manager Evaluation

## **VI. GUIDELINES FOR REPORTING**

The following format is recommended for the draft and final reports from each working group:

1. **Introduction:** Provide a general overview of how the working group addressed criteria in light of the institutional priorities considered. This section can be rather brief.
2. **Method and analysis:** Describe what data were compiled and analyzed. Provide narrative on how Bucknell adheres to each criteria for the Standard. Identify appropriate evidence. This narrative constitutes the largest component of the report.
3. **Strengths:** Enumerate concisely the strengths of the institution, as explained in the analysis.
4. **Areas for Improvement:** Briefly list the issues which need to be addressed by the Institution.
5. **Recommendations:** Identify major suggestions for how Bucknell could address the areas for improvement listed above. Keep in mind that not every recommendation will be included in the final version of the Self-Study, but all recommendations will be compiled as an outcome of the Self-Study process and referred to existing processes or governance bodies for appropriate consideration. Each report should be succinct but contain relevant details. A typical report will be approximately 10-15 pages in length. The report should be double-spaced, using the Times New Roman 12-point font with one-inch margins.



## **VII. ORGANIZATION OF THE FINAL SELF-STUDY REPORT**

The Self-Study will be organized around the reports from the seven working groups. We anticipate using the following structure:

1. Table of Contents
2. Executive Summary
3. Institutional Overview
4. Standard I: Mission and Goals
5. Standard II: Ethics and Integrity
6. Standard III: Design and Delivery of the Student Learning Experience
7. Standard IV: Support of the Student Experience
8. Standard V: Educational Effectiveness Assessment
9. Standard VI: Planning, Resources and Institutional Improvement
10. Standard VII: Governance, Leadership, and Administration
11. Opportunities for Improvement and Innovation

## **VIII. STRATEGY FOR VERIFICATION OF COMPLIANCE WITH APPLICABLE FEDERAL REGULATORY REQUIREMENTS**

The Assistant Provost for Institutional Research & Assessment, a member of our Middle States Leadership Team and Steering Committee, will coordinate the completion of the Verification of Compliance with Accreditation-Relevant Federal Regulations. Based on the current compliance areas, the following campus units will be consulted in this process: Division of Student Life, General Counsel, Institutional Research & Planning, Professional & Continuing Studies, Registrar's Office and Student Financial Services.

## IX. SELF-STUDY TIMETABLE

BUCKNELL SELF-STUDY TIMETABLE	
December 20, 2021	College representatives attend Self-Study Institute
December – January 2021	Skype call with MSCHE liaison Dr. Paul Starkey. Schedule date for the spring MSCHE liaison spring 2022 visit.
December 2021 –	Assemble Steering Committee Communicate with college community – “save the date” for MSCHE liaison visit
January 2022	Begin to draft the Self-Study Design document (SSDD)
December 2021 – February 2022	Recruit and assemble Working Groups
January – March 2022	Complete SSDD – initial draft
February – May 2022	Working Groups identify existing evidence that supports Standard along with any gaps in evidence for their Standard.
February 2022	Steering Committee co-chairs and members go to various meetings of BU community groups to discuss the self-study process – faculty meeting, staff forum, student government and Board of Trustees.
March 24, 2022	SSDD draft sent to MSCHE liaison
April 7, 2022	MSCHE liaison Self-Study Prep Visit
May – June 2022	Revisions and final acceptance of Design (by MSCHE VP Liaison)
May 7, 2022	Self-Study Kickoff Luncheon with Steering Committee and Working Groups
June – September 2022	Revisions and acceptance of SSDD
June 1	Evidence lists and initial examination submitted by each WG
May – August 2022	Data and evidence collection
August – December 2022	Working Groups gather and analyze data and submit progress reports including a gap analysis. The progress report is based on the requirements listed in the charge/template for each WG. Draft of progress report with Gap Analysis & Emerging Recommendations due October 15, 2022 Final progress report with Gap Analysis & Emerging Recommendations due December 15, 2022 These include preliminary findings, summary of what is missing at this point, along with a refined Evidence Inventory. Self-Study process update to the community and the trustees — October
January – May 2023	Working groups work on draft reports for each standard, due March 15, 2023. Self-Study process update to the community and trustees Team chair chosen Team visits dates chosen Self-Study design sent to visiting team chair
May 31	Working Groups submit final reports following the provided template
May – August 2023	Self-Study narrative is drafted. Verification of Compliance Report is prepared – Working group 2, OIRP and the Registrar’s office
September – October 2023	Community and BOT review of Self-Study draft Open Forum(s) for feedback/discussion Online feedback form BOT approves the Self-Study
November – December 2023	Revised Self-Study draft is sent to Team Visit Chair (two weeks before visit) Team Chair preliminary visit
December 2023/January	Self-Study is finalized, based on Team Chair feedback, and shared with community and trustees
2024	Upload to the MSCHE portal, six weeks before the team visit: <ul style="list-style-type: none"> <li>Final Self-Study</li> <li>Selected Evidence Inventory documentation</li> <li>Verification of Compliance with Federal Regulations</li> </ul>
February 2024	<ul style="list-style-type: none"> <li>Visiting Team on campus</li> <li>Team Report</li> <li>Institutional Response</li> </ul>
March/April 2024	MSCHE Commission meets to determine action

## X. COMMUNICATION PLAN

Bucknell University supports a robust, transparent, and broadly inclusive communications strategy throughout the entire Self-Study process. There are three main avenues through which we will communicate with the Bucknell University community: (a) announcements via email or the Message Center, (b) a Self-Study website, and (c) meetings with various constituent groups across the University.

In March 2022 we launched the Bucknell University Middle States Self-Study website, where we will post announcements about the Self-Study process and explain how information regarding the process will be available. The website includes: (a) lists of the members of the Steering Committee and Working Groups, (b) a calendar of events (e.g., Working Group meeting dates, meetings with various constituent groups), (c) draft documents as they become available, (d) general information on the accreditation process, and (e) a comment submission form so that anyone can submit comments directly to each Working Group.

The President and Provost or the Self-Study co-chairs will provide updates on the re-accreditation process at Faculty Meetings and Staff Forum Meetings that occur while school is in session. Open Forums will be held following the distribution of the drafts of the Self-Study document as noted on the Self-Study Time Table.

A feedback submission form available on Bucknell's Self-Study website will be used to gather feedback from all stakeholders and will be regularly monitored by the Steering Committee Co-Chairs.

A series of report templates will be developed to articulate expectations and contribute to the development of reports with a common structural framework.

## XI. EVALUATION TEAM PROFILE

### Characteristics of the Team Chair

Bucknell would prefer a sitting or recently retired president of an institution of comparable scope, complexity and scale. An appreciation of our combination of liberal arts and undergraduate professional educational opportunities, our rural setting and our aspirations is especially important.

### Team Members

Bucknell would prefer team members with individual expertise in one or more of the following: academic affairs and governance; student affairs; strategic planning; DE&I; university finance and operations; assessment.

### Peer Institutions

An incomplete list of our peers includes many Patriot league institutions, such as Colgate, Lafayette, Holy Cross and Lehigh, as well as somewhat larger institutions such Wake Forest and Richmond.

The institutions listed below comprise the official peer group that Bucknell uses for benchmarking institutional performance, both on quantitative metrics and qualitative measures.

It is difficult to find institutions that match Bucknell on all significant characteristics because the University occupies a very distinctive niche in higher education. Salient characteristics of Bucknell include:

- A distinctive size range (approximately 3,600 undergraduates and 70 graduate students), which is larger than most traditional liberal arts colleges and is an important scaling factor for institutional complexity.

- A primary focus on undergraduate education in a residential setting.
- A combination of traditional liberal arts with professional programs in engineering, management, education and music.
- An organizational structure of separate colleges for Arts & Sciences, Engineering and Management.
- Master’s degree programs in selected disciplines.
- Division I intercollegiate sports (I-AA in football) and membership in the Patriot League.

Each peer institution combines some but not all of these key characteristics. The peer list includes both traditional peers and aspirant institutions.

PEER INSTITUTION	CARNEGIE CLASSIFICATION
Colgate University (N.Y.)	Baccalaureate Colleges — Arts & Sciences
College of the Holy Cross (Mass.)	Baccalaureate Colleges — Arts & Sciences
College of William and Mary (Va.)	Research Universities (high research activity)
Davidson College (N.C.)	Baccalaureate Colleges — Arts & Sciences
Dartmouth University (N.H.)	Research Universities (high research activity)
Furman University (S.C.)	Baccalaureate Colleges — Arts & Sciences
Lafayette College (Pa.)	Baccalaureate Colleges — Arts & Sciences
Lehigh University (Pa.)	Research Universities (high research activity)
Middlebury College (Vt.)	Baccalaureate Colleges — Arts & Sciences
Trinity College (Conn.)	Baccalaureate Colleges — Arts & Sciences
University of Richmond (Va.)	Baccalaureate Colleges — Arts & Sciences
Villanova University (Pa.)	Master’s Colleges & Universities (larger program)
Wake Forest University (N.C.)	Research Universities (high research activity)

### Other Institutions Similar to Bucknell

- Dickinson College
- Franklin & Marshall College (conflict of interest: our former Provost is the President of F&M)
- Gettysburg College
- Haverford College
- Hamilton College
- Muhlenberg College
- Skidmore College
- Swarthmore College
- Union College
- Vassar College

## XII. EVIDENCE INVENTORY STRATEGY

A member of the L&IT, a member of the OIRP and a member of the Provost's office have been designated as evidence managers. In each working group a designated evidence manager will work on behalf of the group to upload evidence into their designated Google folder. If the working group data managers cannot find certain evidence, they will route all those requests through the three evidence managers. The three managers will meet as needed or at least bi-weekly to devise a plan for obtaining the evidence requests for that week. Documents will be uploaded to the evidence inventory as they become available. The evidence managers will determine the most appropriate naming convention early in fall 2022. The naming convention will be described in the style guide.

The master Evidence Inventory workbook can be found in the MSCHE Evidence folder on the MSCHE Self-Study 2023-24 Google shared drive. Each standard will have a designated worksheet where all evidence for the standard will be listed. Each document title will be linked to the specific document located also in the evidence inventory. Once a document is uploaded to a working group evidence folder, the title needs to be added to the appropriate section of the master inventory workbook and linked to the uploaded document.

As the Self-Study narrative is being prepared, the contents of the Evidence Inventory will be reviewed, curated and updated as appropriate. While abridged evidence will be selected for upload to Middle States with the narrative, the final unabridged version of this virtual repository will be available to the visiting team.

*We would like to thank the many institutions and especially Haverford College for their willingness to share their self-study design documents and their experiences with the process.*