

# BELLARMINE UNIVERSITY ANNUAL IMPACT REPORT 2019-2020

*Tradition and Transformation*





## FROM THE BOARD CHAIR

On Oct. 3, Bellarmine University celebrates the 70th anniversary of its founding. For seven decades, since Oct. 3, 1950, this institution has educated students in mind, body and spirit and prepared graduates for meaningful lives, rewarding careers and ethical leadership.

It has also held fast to its founding mission: to benefit the public interest, to help create the future and to improve the human condition.

An excellent private university is essential to the success of a city and region. For Louisville, Bellarmine is that university.

Over the years, Bellarmine has built upon its strong liberal arts foundation, strengthening and diversifying its educational offerings by adding new undergraduate majors and programs, as well as professional schools and graduate degrees in fields such as business, education, communication, and the health professions.



Bellarmine's partnerships with area businesses, corporations and non-profits provide experiential learning experiences for students, who as graduates become valued employees.

In 2020, Bellarmine achieved a major objective of its strategic plan, *Tradition and Transformation*, by making the transition to NCAA Division I. This move will elevate Bellarmine's national profile and allow it to share its story of academic excellence with a much wider audience.

Bellarmine University has overcome many challenges in the past 70 years, and it is as strong today as it ever has been.

As a graduate, I can say that Bellarmine taught me the importance of diversity and perspective, as well as the problem-solving, critical-thinking and communication skills necessary to deal with an ever-changing world.

As chair of the Bellarmine Board of Trustees, I can say that I could not be prouder of the university's role in educating excellent students, preparing ethical leaders, and making Louisville a stronger city.

Swords up!

William E. Mudd '93  
President and COO, Churchill Downs Inc.  
Chair, Bellarmine Board of Trustees



## FROM THE PRESIDENT

To say that the 2019-2020 academic year was a tumultuous one is a vast understatement.

First, during the summer of 2019, we announced that our entire athletics program was moving to NCAA Division I through an invitation to the ASUN Conference—the first major initiative in our newly approved strategic plan, *Tradition and Transformation*, (May 2019). Subsequently, in September 2019, we learned that Bellarmine was ranked among the top 200 national universities, per U.S. News & World Report. This was our first year on the “National Universities” list, a result of our change in Carnegie Classification last year. To that end, these two major accomplishments represent the phrase we have coined: “Bellarmine Rising.”

Throughout the Fall and early Spring semester, our campus community was actively engaged in various initiatives, including the master planning process; redeveloping our core curriculum; the NCAA Division I transition; a positioning, branding and pricing study; and developing our fundraising strategy.

Barely halfway through the Spring semester, the novel coronavirus (COVID-19) pandemic moved everyone off campus, and instruction transitioned to online delivery. All events, including the commencement ceremony for our Class of 2020 graduates, were canceled. Additionally, due to necessary precautions to prevent the spread of COVID-19, many of the major projects were disrupted and postponed.

Since Bellarmine’s inception, our community has had to unite in the face of adversity on multiple occasions. Through innovation and resiliency, the university has

overcome various challenges and emerged stronger—and this year was no exception. To be sure, I was impressed and inspired by how flexible our faculty, students and staff were in handling unprecedented changes. They didn’t just adapt, they triumphed in the new normal.

We are fortunate to live in a time where technology allows us to remain connected even while we are apart. The Bellarmine Difference—that personal attention given to each student and the commitment to the development of the whole person (mind, body and spirit)—may have been delivered differently, but it was still there.

Despite the challenges posed by the pandemic, Bellarmine University made great strides in the 2019-2020 academic year toward meeting the six strategic priorities in our strategic plan.

In addition to the aforementioned milestones, achievements delineated in this Annual Report reflect the collaborative work of faculty, staff, administration, students and community stakeholders on key initiatives and activities designed to ensure long-term institutional health and sustainability.

Collaboration and innovation were more important this year than ever, and I thank the entire Bellarmine community for their dedication and commitment.

*In Veritatis Amore,*

*Susan M. Donovan*

Susan M. Donovan, Ph.D.  
President

# COVID-19: Staying Safe, Staying Connected

To respond to the growing novel coronavirus pandemic, Bellarmine University closed residence halls and suspended face-to-face instruction in mid-March, giving faculty four days to learn how to take their classes online. Online-only instruction continued through the summer. The Student Success Center, Counseling Center and Career Development Center provided appointments via email, telephone and video conference. Admission counselors also used technology to meet with prospective students and parents. Reflecting these efforts, enrollment in Summer 2020 classes exceeded that of Summer 2019, total enrollment for Fall 2020 (3,294) was just 37 students short of total enrollment for Fall 2019—and retention of all undergraduate classes (sophomore, junior and senior) exceeded Bellarmine's 10-year average.



**The following are steps that Bellarmine University took in Spring and Summer 2020 to keep students safe and ensure they remained successful. They are categorized under the six strategic priorities of *Tradition and Transformation*.**

#### **STRATEGIC PRIORITY 1: DISTINCTIVE, TRANSFORMATIVE STUDENT EXPERIENCE**

- Approved two policies prompted by disruption of course delivery: a temporary Pass/Fail policy and an extension of our course withdrawal policy.
- Ensured continuity in academic advising, registration, student success and academic support services.
- Placed phone calls to all undergraduate and graduate students to check in on their general well-being, the transition to online learning, and their plans for the Summer and Fall semesters.
- Held virtual celebration of graduating students in place of postponed commencement.

#### **STRATEGIC PRIORITY 2: ACADEMIC INNOVATION AND EXCELLENCE**

- Offered a multidisciplinary summer course, “COVID-19: In This Together,” led by Dr. Jessica Hume and Dr. Melissa McNulty and comprising nearly two dozen faculty and senior administrators with varied expertise. More than just an innovative course offering, this collaborative effort, about the origins and impact of the novel coronavirus, set the stage for future interdisciplinary course and program offerings.
- Migrated 1,008 unique course sections to online platforms with the assistance of 387 faculty members and the Distance Education team led by Adam Elias, Director of Innovative Learning Systems.
- Implemented a clock-stop tenure policy that would permit voluntary delay of up to one year for those faculty on the tenure-track timetable due to disruption caused by migrating to online learning.
- Established a policy to waive the requirement of Spring 2020 course evaluations in any annual review, tenure or promotion evaluation.

#### **STRATEGIC PRIORITY 3: GEOGRAPHICAL AND DIVERSITY EXPANSION**

- Launched a COVID-19 website to share continually updated key information about the university’s pandemic response.
- Extended enrollment deadline from May 1 to June 1.
- Due to the cancellation of many SAT/ACT testing dates, accelerated implementation of test-optional policy from Fall 2021 to Fall 2020.
- Refocused Spring 2020 issue of Bellarmine Magazine on COVID-19 response.

#### **STRATEGIC PRIORITY 4: COMMITMENT TO EQUITY AND INCLUSION**

- Created flexible work schedules and rotations for employees, particularly mindful of those with health issues, those caring for health-sensitive relatives, and those with young children participating in NTI (non-traditional instruction).

#### **STRATEGIC PRIORITY 5: MEANINGFUL ENGAGEMENT AND PARTNERSHIPS**

- Dr. David G. Wolf, professor and chair of Bellarmine University’s Health & Aging Services Leadership Department in the College of Health Professions, was appointed to COVID-19 Long-Term Care/Post-Acute Care (LTC/PAC) Taskforce by Gov. Andy Beshear on April 9. Dr. Wolf, who is nationally recognized in the aging-care sector, is helping to identify policies, procedures, and protocols that will assist long-term care facilities in Kentucky in accepting COVID-19 patients from area hospitals.

#### **STRATEGIC PRIORITY 6: ACCESS AND AFFORDABILITY**

- Responded quickly to students’ sudden and unexpected financial shortfalls by developing a Knights Helping Knights campaign, a collaborative effort that raised more than \$190K from more than 460 donors.
- Division-wide collaboration identified strategic parameters that enabled award of federal CARES Act funding in the amount of \$1.23M. All undergraduate and graduate students (2,574 total) who were enrolled in a degree-seeking program and were eligible for Title IV aid under Section 484 of the Higher Education Act of 1965 received a direct payment from CARES. Students have also received funding from CARES through the emergency financial aid grants handled by the Dean of Students Office.
- Academic Affairs and Development worked closely with faculty to submit two CARES Rapid funding proposals under very tight time frames: NEH CARES – NSF RAPID: NSF 20-052, Dear Colleague Letter on the Coronavirus Disease 2019 (COVID-19).
- Developed a competitive summer tuition pricing structure (through grant offering) and rolled out a robust summer school marketing campaign targeting new, current and visiting undergraduate students (excluding second-degree programs).

# PRIORITY 1

# Distinctive, Transformative Student Experience

Bellarmine will develop a highly personalized pathway and intentional success plan for every student that begins with application for admission and carries through career attainment or post-graduate study, including enhancement of the vibrancy of campus life and clear communication of what a Bellarmine education will deliver to students in the 21st century.

# 99%

**Percentage of 2019 graduates  
working or continuing education  
within six months of graduation**

# 73%

**Percentage of graduates  
who remained in Louisville**

RESIDENTIAL STUDENTS	August 2019	August 2020
First-Year Students	412	345
Second Year*	272	232
Juniors	143	140
Seniors	110	100
Grad./Postbac.	28	13
Exchange	11	0
Transfer/Commuter	31	26
<b>TOTAL</b>	<b>1,007</b>	<b>856</b>

\*INCLUDES RETURNING FIRST-YEAR STUDENTS AND SOPHOMORES

## IMPRESSIVE RETENTION IMPROVEMENTS

**Sophomore retention** of the Fall 2019 cohort was 83.8% (516 out of 616 students), which is:

- +4.6 percentage points above our 10-year average,
- +3.7 percentage points above our 20-year average,
- +4.7 percentage points above our 30-year average, and
- the highest sophomore retention at Bellarmine since the 2004 cohort.

**Junior retention** of the Fall 2018 cohort, at 71.4%, is:

- the highest it's been since the 2012 cohort
- +1.1 percentage points above the 10-year average.

**Senior retention** of the Fall 2017 cohort, at 69.1%, is:

- The highest it's been since the 2012 cohort.
- +2.0 percentage points above the 10-year average.

The one-year retention rate for **Summer/Fall 2019 transfer students** was 78.6% (55 out of 70 students), compared to 68.9% in 2019, 67.9% in 2018, and 69.0% in 2017—a +9.6 percentage point improvement in three years.

The **fifth-year graduation rate** of 64.9% for the 2015 cohort is +0.5 percentage points better than the 10-year average and +1.6 percentage points above the 20-year average.

## STUDENT SUCCESS CENTER (SSC)

- Piloted four Major Maps to ensure that academic departments and campus partners had a clear understanding of the following domains: Academic Planning, Community Engagement, Campus Engagement, Intercultural Appreciation and Meaningful Work.
- Implemented and deployed Beacon—a unified non-cognitive assessment, risk identification, and Customer Relationship Management system that will streamline advising operations on campus.
- Launched the inaugural RISE Sophomore initiative with nine liberal arts majors who participated in a 10-week program.
- Launched the Compassio Learning Community, which is designed for students who wish to engage in dialogue and experiences focused on creating a more inclusive society and challenging societal issues of injustice and intolerance.
- Launched the Explore Learning Community, which is for first-year students who are undecided in their major and/or career path and has curricular and co-curricular activities centered on calling and purpose.
- Made welcome/check-in phone calls to all incoming transfer students for Fall 2019 and Spring 2020 within their first three weeks on campus. Transfer students within an academic year of their transferring received a mid-semester email and end of semester email check-in.

### CliftonStrengths:

- 586 first-year students trained (Class of 2023)
- 115 faculty and staff trained
- 375 upper-class student leaders trained

## CAREER DEVELOPMENT CENTER

- Campus-wide EPIC Student Employment Initiative reached 542 student employees supervised by 89 Bellarmine staff and faculty.
- In collaboration with faculty, the Career Development Center established BU 250 (Community-Based Learning, a 1-hour practicum) and updated BU 444 (Interdisciplinary Internship) to have variable credit hours (from 1 to 6) in order to increase the number of students who gain relevant professional experience prior to graduation.

## Enrollment for Fall 2020

# 3,294

Enrolled **2,485 undergraduate** and **809 graduate** students.

# 573

**Number of students in the first-year class—the most diverse in Bellarmine’s history.** See Strategic Priority 3 for details.

## Student Success Center

# 100%

Percentage of the Fall 2019 cohort, the new transfer students assigned to SSC and second-year students served by the SSC who **were provided professional advising**.

## Retention Improvement

# 83.8%

Percentage of **students retained** in the Fall 2019 cohort.

# 71.4%

Percentage of **students retained** in the Fall 2018 cohort.

## Career Development

# 91%

Percentage of **2019 graduates** were pursuing full-time opportunities in their career field of interest.

# 79%

Percentage of **graduates** participated in **90+ hours of experiential learning** (internships, research, teaching, clinics).



## PRIORITY 2

# Academic Innovation and Excellence

Bellarmine will diversify its educational delivery to become a model for academic innovation and purposeful risk-taking, including the development of new and nimble ways of delivering academic course content and the strengthening of continuing education.



### NEW PROGRAMS AND DELIVERY METHODS

The university created the following new academic programs:

- Early entry model for Master of Arts in Teaching, allowing undergraduate students to complete the MAT in five years
- Bachelor of Science in Data Sciences
- Bachelor of Arts in Physics
- Communications Minor in TV News and Sports
- Certificate in Health Professions Education

The Ph.D. in Health Professions Education moved to 100% online instruction, ideal for working professionals.

### NEW LEADERSHIP

The university made these appointments in academic leadership:

- W. Fielding Rubel School of Business: Dr. Natasha Munshi, Dean
- Bellarmine College of Arts and Sciences: Dr. Mary Huff, Dean (from interim); Dr. Pam Cartor and Laura Hartford, Associate Deans
- Annsley Frazier Thornton School of Education: Dr. Elizabeth Dinkins, Dean (from interim); Dr. Kristen Cook, Associate Dean

### NEW INITIATIVES

Bellarmine negotiated and executed a contract with Orbis Education to develop and deploy Medical Laboratory Science programs in the Southeast U.S. Projected enrollment includes three to five distinct sites.

Under the Provost's leadership, one of the key initiatives of the Academic Innovation committee is developing degree-completion programs aimed at adult learners. Three such programs have been identified for further evaluation.

### SCHWARZMAN SCHOLAR

Mary Wurtz of Crestview Hills, Ky., is the inaugural Bellarmine graduate to be named a Schwarzman Scholar—one of 145 selected. She was scheduled to head to China in August for a year at Tsinghua University in Beijing, although the start date has been delayed by the pandemic.

### ATHLETICS

In Athletics, 266 student-athletes were recognized for academic achievement by conference/coaching associations, and the overall student-athlete GPA for the Spring 2020 semester was 3.65.

“Bellarmine has done so much more than just teach me academic content and check off learning outcomes. It has taught me how to inspire curiosity, teach others and learn and be curious myself and find answers when I have questions.”

ANDERSON REEVES '20, ARTS ADMINISTRATION—MUSIC EMPHASIS

**2020 Rankings:  
U.S. News & World Report**

**#197**

**overall** (Category: National universities)

**#147**

**in social mobility for economically disadvantaged students**

**2020 Rankings:  
Forbes**

**#92**

**among all U.S. universities  
in the South**

# PRIORITY 3

# Geographical and Diversity Expansion

Bellarmine will expand its geographic reach to enhance reputation and impact through enrollment pipelines, athletics, alumni engagement, and outreach.

## FIRST-YEAR STUDENTS: DEMOGRAPHIC PROFILE

**24.7**

Average SAT/ACT  
Composite (24.8 – Fall 2019)

**3.61**

Average high school  
GPA (3.61 – Fall 2019)

**33%**

Percentage of first-  
generation students  
(32% - Fall 2019)

**17%**

Percentage of students  
in the Honors Program  
(16% - Fall 2019)

**22%**

Percentage of students of  
color (18% Fall 2019)

**19%**

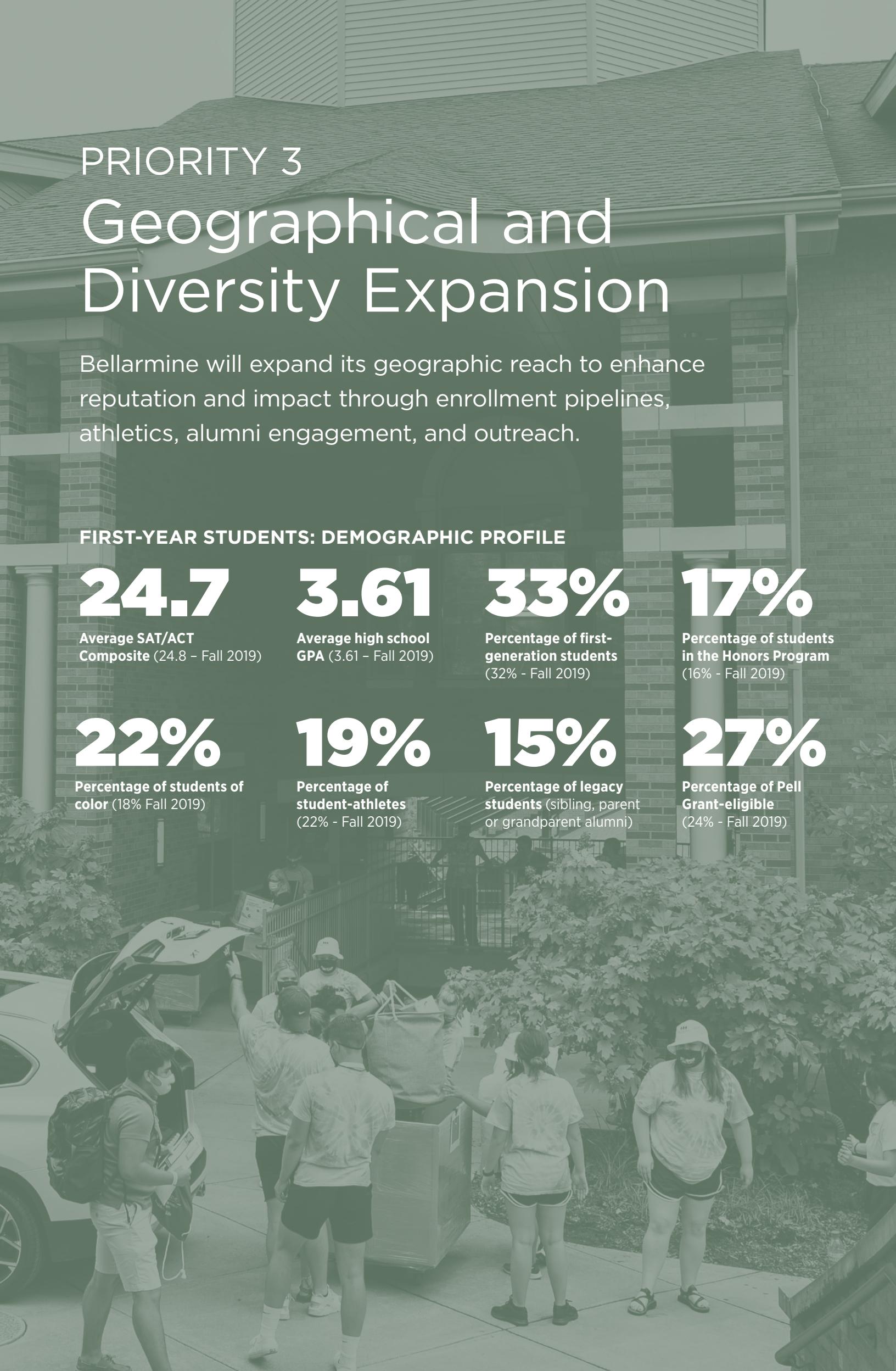
Percentage of  
student-athletes  
(22% - Fall 2019)

**15%**

Percentage of legacy  
students (sibling, parent  
or grandparent alumni)

**27%**

Percentage of Pell  
Grant-eligible  
(24% - Fall 2019)





## First-Year Students: Demographic Profile

# 63%

Percentage of female students  
(65% - Fall 2019)

# 37%

Percentage of male students  
(35% - Fall 2019)

# 69%

Percentage of students from Ky  
(69% - Fall 2019)

## Military-Affiliated Students

# 57%

Percentage increase over Spring 2019  
of enrolled military-affiliated students.

## FIRST-YEAR STUDENTS

Of the 573 first-year students enrolled for Fall 2020:

- 63% female; 37% male
- 22% are students of color, up from 18% in Fall 2019 and representing an all-time high at Bellarmine University.
- 33% are first-generation students, compared to 32% in Fall 2019.
- 27% were Pell Grant-eligible, compared to 24% in Fall 2019.

Students hail from four countries other than the United States: Canada, Mexico, France and Sweden.

**Top Religious Affiliations:** Catholic: 33%, Christian: 17%, No Preference: 8%, Baptist: 7% and Non-Denominational: 6%.

**Top 5 Majors:** Nursing, Undeclared, Business Administration, Biology and Exercise Science.

## TRANSFER STUDENTS

52 are enrolled full time (compared to 69 full-time students in Fall 2019).

**Top 5 Majors:** Psychology, Nursing, Exercise Science, Business and Computer Science.

**Top 5 Previous Institutions:** Jefferson Community and Technical College, University of Louisville, Ivy Tech Community College, Centre College and University of Cincinnati.

## GRADUATE AND SECOND-DEGREE STUDENTS

### Summer Graduate Enrollment

- The Summer 2020 semester experienced some of the highest enrollments for graduate and second-degree programs. We started 76 Doctor of Physical Therapy students versus 72 in Summer 2019.
- There were a total of 284 new enrolled students compared to 256 last year. The majority of this increase is due to the responsiveness of the School of Education in developing two new tracks in our online Master of Arts in Education (MAED) program.

### Graduate Student Enrollment for Fall 2020

205 new graduate and second-degree students enrolled

Top 5 Programs for Fall 2020: Family Nurse Practitioner, Weeknight MBA, Master of Arts in Teaching, Ph.D. – Social Change and Weekend MBA.

## Alumni Association

# 6,142

Individual alumni engaged in events, volunteer opportunities, programs and giving, representing a 20% increase over FY19.

# 103

Events and programs marketed, planned and executed for Alumni Association members.

## Marketing and Communication

# 1.2B

Total earned media impressions  
(1.9% over FY19).



## MILITARY-AFFILIATED STUDENTS

A record number of military-affiliated students enrolled in the Fall 2019 and Spring 2020 semesters—121 in the fall (55% increase over Fall 2018) and 116 in the spring (57% increase over Spring 2019).

### In 2019-2020, the Office of Veterans and Military Services:

- Formed a faculty and staff advisory council with 18 members, all with past or current military affiliation.
- Passed a Military Absence Policy through faculty governance.
- Implemented new student tracking systems to better understand the needs of military-affiliated students.

## ATHLETICS

- Submitted formal NCAA Division I application on July 1, 2020, marking Bellarmine's first day as a reclassifying DI member. Developed a robust rollout to announce the submission of the NCAA application.
- Established financial aid packages for Bellarmine senior student-athletes in spring sports who were approved for additional year of eligibility. The packages provide financial incentives/awards in the amount of \$14,840 to 11 student-athletes.
- Invited by Southern Conference to join as an associate member in wrestling for the 2020-2021 academic year.
- Invited by Mid-American Conference (MAC) to join the league as a field hockey-only participant in 2021-2022.

## ALUMNI RELATIONS

- Marketed, planned and executed 103 events and programs for Alumni Association members, and with the Alumni Board of Director's leadership, raised \$55,000.
- Engaged a record-breaking 6,142 individual alumni in events, volunteer opportunities, programs and giving, representing a 20% increase over Fiscal Year 2019 (FY19).
- Formally established 10 regional chapters, in Washington, D.C., Cincinnati, Lexington, Bardstown, Chicago, Indianapolis, Nashville, St. Louis, Atlanta and Florida. Regional chapters will be utilized to strengthen community connections.
- Added an Assistant Director of Alumni Club and Affinity Engagement to focus on engaging alumni outside the Louisville Metro area.
- Added an Assistant Director of Alumni Events and Communications to coordinate increased alumni engagement.

## MARKETING AND COMMUNICATION

### Media Key Performance Metrics

Total earned media impressions are up 1.9% over FY19, at 1,199,409,953.

- DI ASUN Announcement on June 18, 2019 News Media Reach
  - » Potential reach: 152.51M people
  - » Share of voice: 79%
  - » Total articles: 313 placements
- The bellarmine.edu homepage bounce rate is 39.48% (down 1.6 percentage points) and overall bounce rate is 49.63% (down 3.5 percentage points). Average time on page is 1:34, up 3% from last year. RFI submissions for FY20 were 3,425, up 160.7%.
- Total FY20 social media follower growth is 8 percentage points over FY19, at 4,340 new social media followers gained across social media platforms for @bellarmineu and presidential accounts, raising our total social media follower count to 62,101.
- The president's social media following saw 18% growth across her Twitter and Facebook accounts.

“ASUN membership will help us showcase our student-athletes on a bigger stage and will give us a bigger area from which to recruit even more excellent students.”

BU ATHLETIC DIRECTOR SCOTT WIEGANDT, REFLECTING ON BELLARMINE'S TRANSITION TO NCAA DIVISION I ATHLETICS





## PRIORITY 4

# Equity and Inclusion Commitment

Bellarmine will demonstrate a fully realized and lived commitment to equity and inclusion, empowering all members of its increasingly diverse community and supporting them to achieve their full potential.



**“I know Bellarmine is a lasting home for me because the people in this community support us. It affirmed for me this is where I need to be.”**

#### **NEW LEADERSHIP**

Appointed inaugural Chief Diversity, Equity and Inclusion Officer, Dr. Donald Mitchell, Jr.

#### **PROFESSIONAL DEVELOPMENT**

Conducted institution-wide faculty and staff Diversity, Equity and Inclusion (DEI) training in Spring 2020.

#### **Per survey feedback, attendees shared the following:**

- 87% reported agreement that they learned a new DEI concept to incorporate into their work at Bellarmine.
- 91% were challenged to think about their work with students and colleagues differently.

#### **Faculty and Staff diversity training module completion results:**

- 83% of faculty and staff completed the training

#### **OUTREACH AND ENGAGEMENT**

- Conducted climate survey with a survey response rate of 29.03%.
  - » The 2019 undergraduate climate survey largely followed similar trends of 2016 with only slight increases or decreases. This is promising in that the political climate and overall polarization occurring in society has had some impacts, yet students continue to feel broadly supported, encouraged, and engaged in the work of diversity, equity, and inclusion.
- Launched Diversity, Equity and Inclusion website
- Established affinity groups (Assisi Pride Network and Bellarmine Black Caucus)
- Identity and Inclusion Office expansion completed and renamed the Dr. Patricia Carver Office of Identity & Inclusion (OII).
- Created Diversity Peer Educator positions within Residence Life, a partnership and co-supervision with OII to be launched Fall 2020.
- Facilitated two DEI training sessions with Residence Life student staff in the fall and early spring in response to a racially charged incident.
- Division of Enrollment, Marketing and Communication established a Diversity and Access Committee to focus on enhancing traditionally underrepresented minority outreach efforts

SENIOR KELZE' RILEY, POLITICAL SCIENCE AND COMMUNICATION DOUBLE-MAJOR AND UNDERGRADUATE MEMBER OF THE BELLARMINE PRESIDENT'S ADVISORY BOARD ON EQUITY AND INCLUSION

#### **Faculty and Staff Diversity and Inclusion Efforts**

**83%**

Percentage of faculty and staff who completed the **diversity training module**.

**2**

**Number of new faculty/staff affinity groups established**  
(Assisi Pride Network and Bellarmine Black Caucus)

#### **Expansion of the Dr. Patricia Carver Office of Identity & Inclusion**

**750**

**Number of square feet added to OII's space.**

# PRIORITY 5

# Meaningful Engagement and Partnerships

Bellarmine will be an engaged partner to expand learning opportunities, enhance career networks and economic growth, and advance equity and quality of life for its neighboring communities.



## ONE OF THE CITY'S MOST ADMIRED CEOs

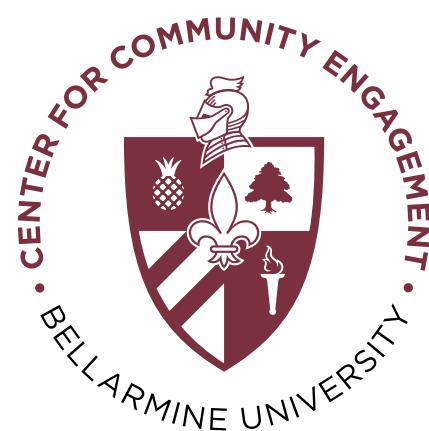
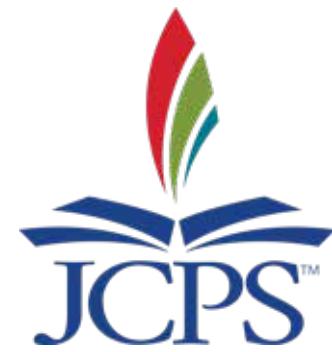
Louisville Business First named Bellarmine University's president, Dr. Susan M. Donovan, as one of the city's most admired CEOs, reflecting her commitment to community engagement and recognition that Bellarmine's mission-based initiatives are vitally important to Louisville.

## STRATEGIC PARTNERSHIP TEAM

During 2019-2020, Bellarmine established a cross-collaborative Strategic Partnership Team to pursue high-value university opportunities that require community engagement and multiple university departments. This unit defined an organizational and assessment framework based on the degree to which initiatives use external partnerships to realize objectives of the other strategic priority areas. Subsequently, collaborators from Development and Alumni Relations, Student Affairs, Academic Affairs and Enrollment, Marketing and Communication met with leaders of each of the other priority areas to define opportunities to align strategic partnership work to directly advance those missions.

### This work included:

- Conducting 70 external and 90 internal meetings to explore and develop strategic partnerships.
- Significantly engaging the 10 largest foundations and 21 of the 25 largest employers in Metro Louisville, developing relationships that enhance the educational, student life and financial strength of Bellarmine University. Key high-level, multi-party strategic conversations and collaborations included those with UPS, Masonic Homes, Norton Healthcare, Microsoft Future of Work, JCPS, and JCTC.
- Launching a community engagement steering committee in Spring 2020 comprising faculty and staff across the university, with a goal of identifying benchmarks and establishing processes to help Bellarmine realize external community engagement recognition and designations.
- Establishing a new workforce development partnership with Masonic Homes of Kentucky, which entails that Masonic Homes will provide paid-part time employment and tuition assistance to Bellarmine students throughout their educational career. A focus of the partnership is to support students graduating from the JCPS Career Academies and Apprenticeship Programs sponsored by Masonic Homes.
- Thanks to philanthropic support from a Trustee, establishing a new partnership with Nativity Academy through which faculty and graduate students in the school of education will provide literacy education to Nativity students and conduct research into the effectiveness of the educational programming.
- Establishing a new partnership between the Ann S. Frazier Thornton School of Education and Okolona Elementary School in which a Bellarmine student observed and co-taught with every teacher in the school one day a week for the entire 2019-2020 academic year. (Teaching moved online for much of the Spring 2020 semester.) Remaining at the same school for an entire year allows teacher candidates to become more deeply involved in the school while also deepening their own experience as Bellarmine education students. About 60% of the approximately 300 pre-K through fifth grade students at Okolona Elementary identify as minorities and 85% are eligible for free and reduced lunch.





## PRIORITY 6

# Enhance Access and Affordability

Bellarmine will be a responsible and effective steward of its resources, making a Bellarmine education accessible to students of all backgrounds and ensuring financial stability for decades to come.



## FINANCIAL AID

In order to make a Bellarmine University education more affordable, the Office of Financial Aid:

- Invested more than \$65M in institutional aid
- Invested more than \$18M in first-year institutional aid
- Set an undergraduate tuition and fee increase of 1.5%, consistent with previous year
- Once again did not increase room and board rates
- Financial aid appeals: +72% increase in appeals awarded and 45% increase in amount of total appeal aid awarded (more than \$320K total appeal aid awarded)

### Increased number of LRAP (Loan Repayment Assistance Program) offers:

- Fall 2020: 46% increase in Loan Repayment Assistance Program (LRAP) offers; 79% increase in enrolled students offered LRAP.

### Summer 2020 Enrollment

Summer 2020 UG enrollment headcount and credit hours were up compared to Summer 2019: +44.8% credit hours (3,197 vs. 2,208) and +23.9% headcount (628 vs. 507) (excludes accelerated bachelor of science in nursing students and accounting certificate students).

## OFFICE OF DEVELOPMENT AND ALUMNI RELATIONS

Thanks to the tremendous generosity of donors and exceptional leadership by the Board of Trustees, Bellarmine's fundraising success led to a national educational fundraising award from the Council for Advancement and Support of Education in 2019. Bellarmine's CASE Educational Fundraising Award for Overall Performance was one of just 90 awards the organization presented to colleges and universities nationwide. The university's donors include thousands of alumni and alumnae, parents, board members, faculty, staff, students and community leaders, all of whom contributed to the largest gift total in Bellarmine's history in 2018—\$12.4 million—as well as a record-breaking Day of Giving. The CASE award is based on a blind review of fundraising data by a panel of experienced educational fundraisers. The overall performance award recognizes universities that "show solid program growth, breadth in the base of support and other indications of a mature, well-maintained program," according to the CASE website. Bellarmine previously received this award in 1999, 2005 and 2015.

### In 2019-2020, the Office of Development and Alumni Relations continued its support of Bellarmine University by:

- Securing \$9,810,070 in total support, including new cash, new pledges, sponsorships, and federal grants—a 56% increase over FY19 despite COVID-19 halting most major gift fundraising for the last quarter.
- Raising \$2,966,313 in Annual Fund Support, a 22% increase over goal.
- Developing and beginning a Division I athletic campaign, with the total secured for DI initiatives standing at \$5.088M, including 14 unique donors committing amounts ranging from \$50,000 to \$1M.
- Hiring an Associate Athletic Director for Development with experience at three top-tier DI schools.
- Launching the Athletics Knight Club, following best practices at peer institutions, and raising an initial \$42,095.
- Researching best practices from comparable and aspirational universities and conferences.

## ACADEMIC AFFAIRS

- Submitted successful National Science Foundation S-STEM Track 2 proposal for \$988,000.
- Working with Student Affairs and Development, submitted successful Department of Justice grant for nearly \$300,000.

## Financial Aid

# \$65M

Invested approximately \$65M in institutional aid (+6.6% FA19)

# \$18M

Invested nearly \$18M in first-year institutional aid

## Annual Fund

# \$9.8M

Total support secured for the year

## Division I Athletic Campaign

# \$5M

Total secured for DI initiatives, including 14 unique donors committing amounts ranging from \$50,000 to \$1M.

# \$42K

Initial funds raised for the Athletics Knight Club.

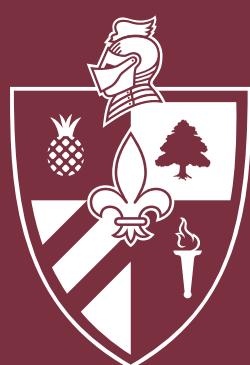
## Academic Affairs

# \$988K

Amount rewarded for a National Science Foundation S-STEM Track 2 proposal.

# \$300K

Amount rewarded for a Department of Justice grant.



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