



UNIVERSITY GOVERNANCE RECORD

Minutes of the Faculty Forum on Merit Aid

February 25, 2002

The meeting was called to order at 5PM by Prof. Michael Payne. He explained that we had no agenda nor would we adhere to Robert's Rules. He reminded the faculty that by means of these minutes, there would be an extended audience for this discussion, in particular the Trustee Subcommittee on merit aid, chaired by Joe Ciffolillo. He also observed that the merit aid question involves several complicated issues, including costs both financial and potentially symbolic. He summarized the objectives of merit aid, as listed in the document written by VP Charlie Pollock (on ERES): to enroll top academic students, to increase diversity, to add performing arts talent, to level the playing field for student-athletes, and to protect recent gains in the first-year class profile.

Before VP Pollock began his presentation, President Rogers introduced Kurt Thiede, the new VP for Enrollment Management.

VP Pollock opened by noting that the Trustee Merit Aid Subcommittee would report to the Trustee Long-Range Planning Committee between now and April. He reviewed the current method of granting need-based financial aid. We currently have preferential aid packages that replace some loan or work-study components with grants; the Bucknell grants are implemented partly as real dollars from endowment funds and partly as revenue foregone. We currently have about 270 preferential aid packages, but in some years not all the offered packages are accepted. Particularly notable is the low yield rate on these packages among students of color. In the Patriot League, only Colgate and Bucknell do not offer merit aid in basketball. He estimated that if we offer approximately 80 merit awards per class, plus basketball awards, it would cost \$2.5 million per year. The intent was to raise this from new monies and to phase in merit aid gradually. He concluded by noting that a number of people on campus have been consulted about this issue, and that no recommendation will go forward from the subcommittee that does not have serious conditions attached, including how to pay for this program, how to select recipients, how to protect the needs of lower income students, and ratio of merit to nonmerit aid.

Prof. Ben Marsh offered a perspective as recent chair of the Committee on Admissions and Financial Aid, and as a member of COI when the issue was first discussed 6 yrs ago. In earlier discussions, objections to merit aid included the opinion that money was better spent on students with need, there would be no "global benefit" if everyone gave aid, and that offering merit aid could be seen as institutional desperation. But a year ago, the CAFA reconsidered upon realizing that more schools we compete with are now using merit aid. The CAFA did not offer a recommendation on merit aid, partly because of disagreements within the committee and also because CAFA was not sure it was the right committee to make the decision. However, it offered some principles to guide discussion. No loss of access in regular aid should be permitted, weighting of merit aid

should be toward academic recruits, procedures need to be developed on campus for awarding merit aid, and any policy changes in aid should come to the faculty, which purpose this meeting serves.

In response to several questions, Gil Villanueva (Admissions) said that he had surveyed several other schools who have adopted merit aid. All but one considered it a good move. The one exception noted continuing problems in recruiting lacrosse players.

Prof. Steve Stamos asked how the target of 80 awards per year was chosen; Mr. Pollock said that 80 was not a sacred number but he would like a substantial number of awards for recruitment of students of color. He also was optimistic that money could be raised for merit aid. Prof. Carl Milofsky asked what would happen if a student recruited for a talent chose not to exercise that talent upon arrival. This has not yet been worked out, but in preferential athletics packages the University tries to find some continuing connection between the student and the sport. In addition, we would have to consider if we want GPA expectations for academic awards and whether academic awards should be tied to choice of major.

Prof. Gary Grant asked if merit aid was already a done deal, or if not, was it inevitable? VP Pollock said it was not a done deal but thinks it is inevitable. Trustees are currently not of one mind on whether to offer merit aid, and if so, on the details of its implementation. Prof. Payne voiced concern about the cost of not keeping academic and artistic priorities in the awards.

In response to other questions, VP Pollock said that division of awards was still under discussion but that one plan would be to have 20 or 25 per class for diversity, 5 for artistic talent, 25 for athletics, and the balance for academics. He also emphasized that no money would be taken from current programs, and that some merit awards would go to students with financial need. Prof. Greg Krohn said that meeting academic and diversity goals as a priority would be necessary for him to support a merit aid plan, and Prof. Peter Kresl emphasized that faculty should be involved in allocation of awards among priorities.

Prof. Doug Candland asked for confirmation that an annual outlay of \$2.5 million would require an income from a \$50 million endowment; VP Pollock so confirmed.

Prof. George Exner raised issue of governance. He thought the Committees on Planning and Budget, and Instruction, as well as CAFA, should be considering this issue; we should not just rely on this forum. Several other faculty echoed this concern. Prof. Payne noted that the faculty is being asked for its opinion at an early stage of the process, and that motions may be offered by any faculty member when the topic is brought up at a faculty meeting. Another concern of several faculty was that we do not have a concrete proposal to consider, which should perhaps be brought forward from governance committees. Prof. Jackson Hill observed that merit aid slots for performing artists would be welcome, as the number of applicants has risen recently.

Prof. Grant wondered if this discussion should be about whether we should be giving merit aid at all, given our tradition of need-based education. Prof. Sojka worried about how awards would be offered. How would students be prioritized? Prof. Payne asked if these issues can be considered by CAFA. Prof. Marsh brought up a related concern about how, exactly, one can recruit for academically talented students. He also asked that recent emails circulating among the faculty be sent to Trustees, along with these minutes, which Prof. Payne agreed to do.

Prof. Candland stated his opposition to merit aid awards on philosophical grounds. This door, once opened, cannot be closed. Director of Athletics John Hardt and President Rogers indicated sympathy with the difficult basketball recruiting situation; the President also was concerned about meeting academic talent and diversity goals. He reminded us that this was not a fait accompli, however. VP Bob Kallin agreed with earlier optimism that funds could be raised for merit aid.

Prof. Nancy White asked where the needy, talented students going for college. Dean of Admissions Mark Davies noted that our competition is growing, and President Rogers added that the Ivy League schools do not offer pure need-based aid any more.

Concluding remarks included a plea from Prof. Exner to have any merit aid plan be developed on campus. He was also troubled by the possibility of us “selling” an individual piece of the merit aid plan to donors; donors should commit to a comprehensive plan. Prof. Sojka shared this concern that we not turn the university over to wealthy donors – although, on the other hand we have some other programs that work because they do appeal to particular donors.

The meeting was adjourned at 6:30 PM.

Respectfully submitted,

Andrea Halpern
Secretary of the Faculty