

**REPORT ON  
GENERAL PRIORITIES:  
STRATEGIC NEEDS  
AND OPPORTUNITIES**

Indiana University Bloomington

Strategic Planning Committee

May 2003

The Strategic Planning Committee (SPC) released its first report, on the *Mission and Values Statement, Academic Priorities, and Review Process for Proposals for Commitment to Excellence Funding*, in January 2003. In that report, we addressed three of the five tasks with which the committee is charged: (1) drafting a statement of mission and values for the Bloomington campus; (2) drafting a statement of academic priorities to guide the ongoing investment of a large portion of the Commitment to Excellence funds; and (3) recommending to the Chancellor a process for reviewing proposals seeking Commitment to Excellence funding.

With work on those three tasks completed, the SPC turned its attention to its fourth responsibility. The committee met six times during the spring semester to identify “general priorities.” The committee believes that general priorities should reflect those needs and opportunities that are critical to the reputation and quality of the campus *as a whole*. Unlike the academic priorities, there is no identified source of funds to invest in the general priorities. Instead, the general priorities are intended to help guide future efforts to generate new funds as well as the allocation of some portion of existing funds.

Many of the general priorities are academic, and certainly all significantly affect the academic programs and reputation of the campus. We believe, however, that these “general priorities” can be distinguished from the “academic priorities” we identified in our first report by the fact that the academic priorities focus exclusively on academic disciplines, while the general priorities apply without regard to specific disciplines or subject matter.

In our first report, we noted that Indiana University Bloomington faces many significant challenges, including considerable underfunding; new demands for scarce resources; little prospect of substantial new increases in funding; serious needs in physical plant, equipment, and other infrastructure; and a history of considerable tuition increases that threatens the campus’s tradition of accessibility to Indiana residents and its attractiveness to out-of-state students when compared with other colleges and universities. We concluded with no sense of exaggeration that the failure to meet these needs in the near future will seriously impair the campus’s ability to meet its research, teaching, and service missions and to compete in the top tier of public universities.

At the same time, we stressed the many accomplishments and strengths of the campus, despite these challenges. We proposed a mission and values statement that articulated what we believe is a widely shared commitment on this campus to a bold and distinctive vision of the highest quality public education. We also highlighted the campus’s opportunity to implement an imaginative strategy—now well under way—for the use of Commitment to Excellence funds to advance the campus, improve its competitiveness among peer institutions, and enhance the research, creativity, and learning it fosters, thereby improving its ability to serve the public.

In this report, we return to the significant needs facing the campus, in an effort to help focus the campus’s attention on those that appear to us most critical to the reputation and quality of the campus as a whole. As with our first report, we are concerned with the *strategic* investment of scarce resources. By focusing on what we believe are the most strategically significant needs, we hope we can help both overcome the sense of being so overwhelmed by needs that it is futile to address any, and ensure that the campus’s time and money are invested as effectively as possible.

By doing so, we do not intend to cast doubt on the importance of other campus needs or the need to address them.

For many of the strategic general priorities we have identified, we have attempted to highlight the need and possible directions for further study, without recommending specific solutions. This reflects the breadth of issues we examined and the practical reality that no one committee could have the time or the expertise to explore all of the issues in exhaustive detail. Most of these issues are already being addressed by other campus groups or officials. We are grateful for the assistance of many people involved in those processes; we intend our efforts to lend support to theirs.

Some issues are the subject of such extensive on-going efforts that we have omitted further discussion of them. For example, in our first report we highlighted the importance of “building diversity” and we are well aware of concerns about the campus climate and the extent to which all students, staff, and faculty—without regard for age, disability, ethnicity, gender, marital status, national origin, race, religion, sexual orientation, or veteran status—feel welcome and included in the campus community. But the committee is also aware that these critical issues are the subject of extensive efforts led by Chancellor Brehm, Vice President Nelms, and others, and we have little additional to contribute, other than our support, to these initiatives.

The committee recognizes that it is much easier to identify priorities than to act on them. We considered suggesting specific people or organizations to bear responsibility for each of the priorities identified below. We ultimately decided not to attempt this, recognizing that we lacked the competence and the mandate to do so. Nevertheless, we are convinced that assigning responsibility for each recommendation is essential if these priorities are to result in practical benefits to the campus. We therefore respectfully urge the Chancellor to identify publicly and explicitly the individuals and organizations responsible for examining and, where appropriate, implementing each of the recommendations below.

When drafting our first report—on strategic academic priorities—the committee sought broad campus input, given the nature of those priorities and the fact that funding for them was to be provided by a \$1,000 tuition assessment that every new undergraduate on the Bloomington campus would pay. With these strategic general priorities, the committee adopted a different consultation strategy. This strategy reflected our concern with keeping this document focused on a manageable list of truly strategic priorities, avoiding consuming vast campus resources to identify general priorities for which there is no identified funding, and ensuring that we did not interfere with other on-going initiatives.

We therefore sought comments on a draft of this report through the organizations that originally nominated committee members—the Bloomington Faculty Council, Bloomington Professional Council, Graduate and Professional Student Organization, and Indiana University Student Association—as well as from 40 individuals specifically chosen for their broad or distinctive perspective on the campus. We are grateful to the many people who generously shared their expertise with us. In particular, the committee would like to thank Chancellor Brehm; J. Peter Burkholder, Professor of Music; Terry Clapacs, Vice President and Chief Administrative Officer; Robert Eno, Professor of East Asian Languages and Cultures and then-President of the

Bloomington Faculty Council; Ken Gros Louis, Chancellor Emeritus; Don Hossler, Vice Chancellor for Enrollment Services; Perry Metz, Associate Vice President; Myrtle Scott, Herman B Wells Endowed Professor Emeritus; Neil Theobald, Vice Chancellor for Budget and Administration; Maynard Thompson, Vice Chancellor for Budget and Administration Emeritus; and Suzanne Thorin, Ruth Lilly University Dean of University Libraries and Associate Vice President for Digital Library Development. While these colleagues have contributed substantially to the preparation of this report, they are not responsible for its contents and do not necessarily agree with its conclusions.

## 1. Undergraduate Education and Student Life

At the core of the campus are its students and its mission to provide the tools necessary for, and an environment conducive to, learning. While the campus has many academic strengths and celebrated programs, the committee perceives the existence of needs that run the risk of denying students important opportunities, interfering with achieving the campus's missions, and placing Indiana University Bloomington at a competitive disadvantage with its peer institutions.

There are many issues relating to undergraduate education and student life, but the committee wishes to focus particular attention on five that we believe are strategically critical for the campus to address:

- 1.1. The campus needs to do more to attract the most qualified students. The mission of the campus to serve all qualified students is a vital one, but it is furthered—not restrained—by conscious efforts to interest the best high school students, especially those from Indiana, in the campus and its excellent programs. Targeting top high school juniors and seniors, recruiting for the campus's excellent Honors College, expanding discipline-specific efforts to attract leading students interested in those areas, and increasing funding for merit-based scholarships are essential to improving the quality of learning on the campus.
- 1.2. Students interested in Indiana University Bloomington increasingly may choose to go elsewhere because declining state financial support and inadequate financial aid make this campus more expensive than comparable institutions. Allocating and raising funds for more financial aid—both need- and merit-based—are critical to attracting and retaining the most qualified students. This is especially important to the campus's efforts to recruit and retain students of color. There is abundant evidence of the beneficial effects of diversity on *all* students. Recruiting highly qualified students, as well as a more diverse population of such students, will require significant new funds, but we believe that doing so is a strategic priority for the Bloomington campus.
- 1.3. The campus should expand its efforts to enhance the quality of undergraduates' academic experience, their focus on academic inquiry and accomplishment, and the development and exercise of mature and responsible judgment in all aspects of student life while at Indiana University Bloomington. The committee recommends:
  - 1.3.1. The development of "capstone" experiences for students in their junior and senior years to help provide structured opportunities for integrating diverse coursework and

learning. We believe such experiences are important to enhance the quality and relevance of undergraduates' learning, promote the development of skills and independent inquiry, and better prepare students for life after college.

1.3.2. Renewed consideration of some form of shared academic experiences for new students during their first year on campus. We believe that more could be done to acclimate all new students to an educational environment, introduce them to academic values, and help build a community of new students based at least in part on the excitement of academic inquiry and the opportunities of the campus environment.

1.3.3. The greater integration of academics with the residence halls. There are already significant efforts to integrate academics and residential life; we applaud these and encourage additional exploration of ways to link faculty and academic programs with students in residence halls.

1.4. There also appears to be a need for more clarity and structure in the curricula across the campus, and for clearer relationships among those curricula and between them and coursework at other IU campuses and other Indiana educational institutions. Attention to these important issues should include:

1.4.1. Articulation of common requirements that all students should have met, or minimum competencies that all students should be able to demonstrate, prior to graduation.

1.4.2. Renewed consideration of general education requirements. At a minimum, the campus should standardize how the main distribution areas are designated and specify what courses count for each in a way that can be used by every school.

1.4.3. A sound, consistent, and predictable basis for accepting course credit from other campuses and Indiana colleges and universities.

1.5. Support services for students seem to have evolved in response to specific needs and initiatives, and in many cases appear to be underfunded and inadequate both in terms of meeting student needs and when compared with peer institutions. The campus should examine systematically how student support services are organized and delivered, and consider changes (e.g., different organizational structures, appropriate use of Web-based resources, flextime and other alternative employment arrangements) to enhance the quality and efficiency of student services, and to ensure that they are competitive with those provided by other public research universities. Where necessary, the campus should increase funding for student services.

## 2. Graduate Student Support

The quality of a research university is intrinsically linked to the institution's ability to attract and retain highly qualified graduate students. On the Bloomington campus, funding for both graduate fellowships and assistantships is inadequate. Moreover, most graduate support is in

the form of assistantship stipends, which require recipients to teach. As a result, in many fields we are not competitive with peer institutions in attracting the best graduate students or in supporting them to the completion of their graduate degrees.

The Commitment to Excellence graduate fellowship matching program is an important first step toward addressing this need, but it is likely to take a decade or more to raise the necessary matching funds and, even then, the new fellowships will only begin to address the larger problem.

Moreover, there are a variety of issues surrounding graduate assistantships (e.g., the imbalance in the stipends, teaching loads, opportunities and responsibilities for graduate associate instructors across the campus), the administration of graduate programs, and the role of the University Graduate School. The committee therefore recommends that the campus seek to:

- 2.1. Significantly increase funding for graduate fellowships and assistantships, both through reallocation of existing funds and through new targeted fund-raising.
- 2.2. Explore the relationship between the University Graduate School and the individual graduate programs to determine how graduate student needs and issues can be addressed most effectively, fairly, and efficiently.

### 3. Infrastructure Needs

Indiana University Bloomington faces many significant infrastructure needs. The campus needs more classrooms, teaching and research labs, and offices; much of its existing space requires significant renovation; and the planning process for anticipating and addressing space often lacks consistent faculty and other academic involvement. Meeting these needs is critical to the campus's ability to achieve its academic mission. The committee recommends that the campus should:

- 3.1. Enhance the involvement of faculty and academic units in systematically identifying existing space needs, anticipating likely future needs, and crafting a thoughtful, academically sound master plan to guide future building, land use, and renovations on the campus. This requires the creation of new planning and consultation processes and/or the greater involvement of faculty and other campuses constituencies in, and the more effective use of, existing ones.
- 3.2. Identify the building of new classroom, lab, and office space as a critical priority, and work closely with the university, the Foundation, the Trustees, and the State to generate the funds necessary to meet this need.
- 3.3. As part of the planning process, work with the university to ensure that buildings in need of repair are identified and fixed as quickly as possible. In addition, some facilities require modification or renovation to adapt to changing uses, technologies, and needs. The Main Library and the Musical Arts Center appear to be two prime examples. Updating and re-equipping facilities such as these can greatly extend their useful lifespan, often at lower cost than would be required to build entirely new buildings.

- 3.4. Explore alternatives for meeting space needs, including increasing options for classroom and other space utilization (for example, by scheduling classes throughout the day and week, and during evenings and weekends), and explicitly considering the impact of information technologies. In addition, the campus should examine whether current uses of physical space are appropriate in light of competing needs or whether some uses could be better accommodated elsewhere.

In addition to physical space, the campus clearly has other critical infrastructure needs. The committee wishes to highlight two that it believes particularly warrant immediate attention:

- 3.5. The first is the campus's libraries. Libraries are critical to the work of virtually all students and faculty. The emergence of new technologies in many ways has increased, rather than diminished, the importance of libraries; it has certainly added to the demands placed on library facilities and personnel; and it has not significantly reduced the need of students and faculty alike to have access to up-to-date collections of printed research and instructional materials. Despite the increasing demands on libraries, however, it appears that their operating budgets have actually declined in real dollars over the past two decades. The committee believes that library facilities, collections, and personnel are part of the critical infrastructure necessary to carrying out the campus's academic missions. Ensuring their adequate funding is therefore a strategic general priority.

- 3.6. The committee is concerned not merely that many infrastructure needs exist and that their existence has been acknowledged in some cases for decades, but also by the perception that systems are not in place or are not working to address them effectively. For example, there is a widely shared perception that parking and other transportation systems are inadequate, and that faculty and other academic unit concerns on these matters are often ignored. Similarly, the lack of central air conditioning on the top four floors of Ballantine Hall and the inadequacy of the supply of both chilled water and electricity on the campus necessary to remedy this have created a longstanding stalemate: those floors are largely uninhabitable during summer months, yet no plans appear to have been created for rectifying this situation. It is important that the campus be engaged in actively addressing the wide range of infrastructure issues—in an open, inclusive, and effective manner—whether through the facilities planning process identified above or through other appropriate processes.

#### 4. Personnel

The committee has identified a number of issues relating to personnel. Many of these are already the subject of on-going inquiries and initiatives. We believe, however, that their resolution is important to the future of the campus. We divide our recommendations into two groups. The first concerns ways of enhancing the campus's ability to attract, retain, and motivate faculty and staff. Specifically, the committee recommends campus action to address the following:

- 4.1. We have been impressed throughout our discussions by the significant roles that staff play in the operation of the campus and the pursuit of our research, teaching, and service

missions. Yet it appears that the faculty and other members of the campus community often fail to recognize or appreciate the importance of those roles or of the people who fill them. This situation requires immediate attention if we are to attract and retain the quality staff necessary to the success of the campus. This is not simply an issue of compensation; it is vital that the campus enhance its efforts to integrate staff in the academic mission of the campus, provide better training and feedback, recognize and value staff contributions, and meet their needs.

- 4.2. It is self-serving for a committee composed primarily of campus employees to identify increasing faculty and staff salaries as a strategic priority, but that conclusion is inescapable. Already, the campus is in too many disciplines near the bottom of its peer institutions in terms of faculty salaries and other benefits. We are losing the ability to compete with peer institutions that offer more generous compensation. Attracting and retaining quality faculty and staff are critical to achieving our missions; they are essential to remaining—or, in some cases, becoming—competitive with peer schools. They require not only more money, but also a better, more specific understanding of personnel (and especially staff) needs, choices, and competitive opportunities.
- 4.3. One of the most effective ways, other than salary, that we can compete with peer institutions is by providing employment for spouses of faculty and staff. The inability to hire spouses, especially spouses who are academic professionals, can be fatal to attracting and retaining qualified personnel, because the campus is the only university-level institution in the area. Often, problems concerning spousal hiring are not financial, but rather have to do with coordination among units, timing, and other issues that could be resolved through better coordination. Similarly, another critical issue for many faculty and staff is finding appropriate childcare. The problem is not simply cost (although this often is an issue), but the lack of options to respond to different family needs. The provision of affordable childcare options is another way the campus can help attract and retain excellent faculty and staff. Important efforts with regard to spousal hiring, options for childcare, and other services are already under way; we applaud these and recommend that additional attention be given to these issues.
- 4.4. One longstanding strength of the Bloomington campus has been its ability, despite its size, to respect faculty, staff, and students as individuals and to inspire a sense of loyalty and commitment that is often rare in large institutions. These attributes have succeeded in creating a rich, diverse, and stimulating community; they are at the heart of much of the campus's success. Increases in the size of the campus, the demands on personnel, and competition for scarce financial resources threaten the campus's distinctive character. The committee believes it is vital that the campus guard against this risk. There are many possible steps, including efforts to integrate new faculty and staff into the greater campus community, involve faculty and staff in campus (as opposed to just department or school) service, facilitate the continued and active involvement of retired faculty and staff in the campus community, and support and highlight campus-wide cultural and intellectual opportunities. These and other initiatives not only enhance the lives of the individuals involved, the quality of life on the campus as a whole, and the capacity of the campus for learning, scholarship, and service to the people of Indiana.

The committee also wishes to highlight a second group of issues relating to the campus's expanding use of other than tenure-track faculty to teach undergraduate courses:

- 4.5. The use of lecturers (the new categorization of "non-tenure-track academic appointees"), graduate students, and others is a valuable addition to our teaching staff, but it also poses significant issues. Included among these are issues of fair salary, benefits, review, effect on campus academics and campus life, expectations, equity across academic units, and the academic freedom of lecturers. These issues warrant close examination by the campus
- 4.6. In addition, as the campus relies more heavily on non-tenure-track faculty it decreases the percentage (as well as, perhaps, the actual number) of courses that can be offered by tenure-track faculty. The campus also runs the risk of reducing its per capita research output (as well as the percentage of research conducted by tenure-track faculty). At the same time, the service load on tenure-track faculty appears to be increasing. This raises substantial issues for the quality of undergraduate learning, the accessibility of tenure-track faculty to students, the ranking of the campus and its individual academic units, and the ability of the campus to carry out its research, teaching, and service missions. All of these warrant close examination by the campus.

## 5. Campus Coordination and Decision-making

At many points during our discussions about academic and general priorities it has become clear that the campus is burdened by often complex organizational structures that restrict cross-campus partnerships, inhibit meaningful review of programs and units, make decision-making more cumbersome and time-consuming than necessary, and interfere with conveying the mission of the campus to alumni, external partners, and the State of Indiana. These issues are not easily resolved, but the committee wishes to highlight four that it believes warrant particular attention:

- 5.1. It is difficult to explain how academic units are organized, particularly in light of recent changes in curricula and disciplines. We encourage discussions, some of which are already under way, about ways of better organizing, integrating, and/or improving communication and cooperation among academic units that share common interests and disciplines to improve the quality and the efficiency of the learning and research they facilitate.
- 5.2. As we pointed out in our first report, the campus is better at creating new initiatives, than at assessing the effects of those initiatives over the years or examining ourselves as a dynamic campus. Yet the unwillingness or inability to examine closely our successes and failures undermines our efforts to generate new public support and diminishes our effectiveness in research, teaching, and service. There is a pressing need for the development and use of appropriate institutional research processes and data necessary for meaningful self-assessment
- 5.3. We perceive a need for closer coordination between academic and administrative decision-making. Because Bloomington was the first (and, for some time, only) campus and because so much of the university administration is located on the Bloomington campus,

campus and university administrative structures have naturally been intertwined and, at times, complex. These interconnections often benefit the campus. However, many issues that have a significant impact on the campus's ability to carry out its academic mission appear to be addressed without visible systematic campus or faculty input. The committee believes it is important that functions currently designated as university-level (e.g., alumni affairs, athletics, facilities and land use planning, financial management, fund-raising, information technology, personnel and benefits, and research funding and compliance) be closely coordinated with campus planning so that there can be appropriate faculty consultation and administrative coordination. We recognize that efforts toward this end are already under way. The committee applauds these efforts and hopes they will continue and be expanded.

- 5.4. The committee believes it is critical that the on-going efforts to convey the mission of the campus and its relevance to the public and to the State of Indiana be expanded and intensified. This includes both improved communications with external constituencies and an increased awareness within the campus of the importance of public understanding and of our obligation and many opportunities to serve the public.

## Conclusion

The campus faces many challenges. These priorities highlight those that we believe are most critical, most fundamental to the campus's continued and expanded success, in a word, most *strategic*. We do not want our focus on these to overshadow the fact that there are other issues that need to be addressed. Equally important, however, we do not want that focus to obscure the many remarkable accomplishments this campus has achieved despite the presence of unmet needs, or the significant efforts that are already under way to address the priorities we identify in this report. This success is a result of the quality and commitment of the faculty and staff on the Bloomington campus and throughout Indiana University, and the close cooperation and support of generations of students and their parents, the Bloomington community, and the State of Indiana. These longstanding partnerships are at the heart of public education, and they are more important than ever if we are to overcome the challenges ahead and fulfill our mission of "advanc[ing] knowledge and learning to serve the changing needs of society."

Respectfully submitted,

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Strategic Planning Committee

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