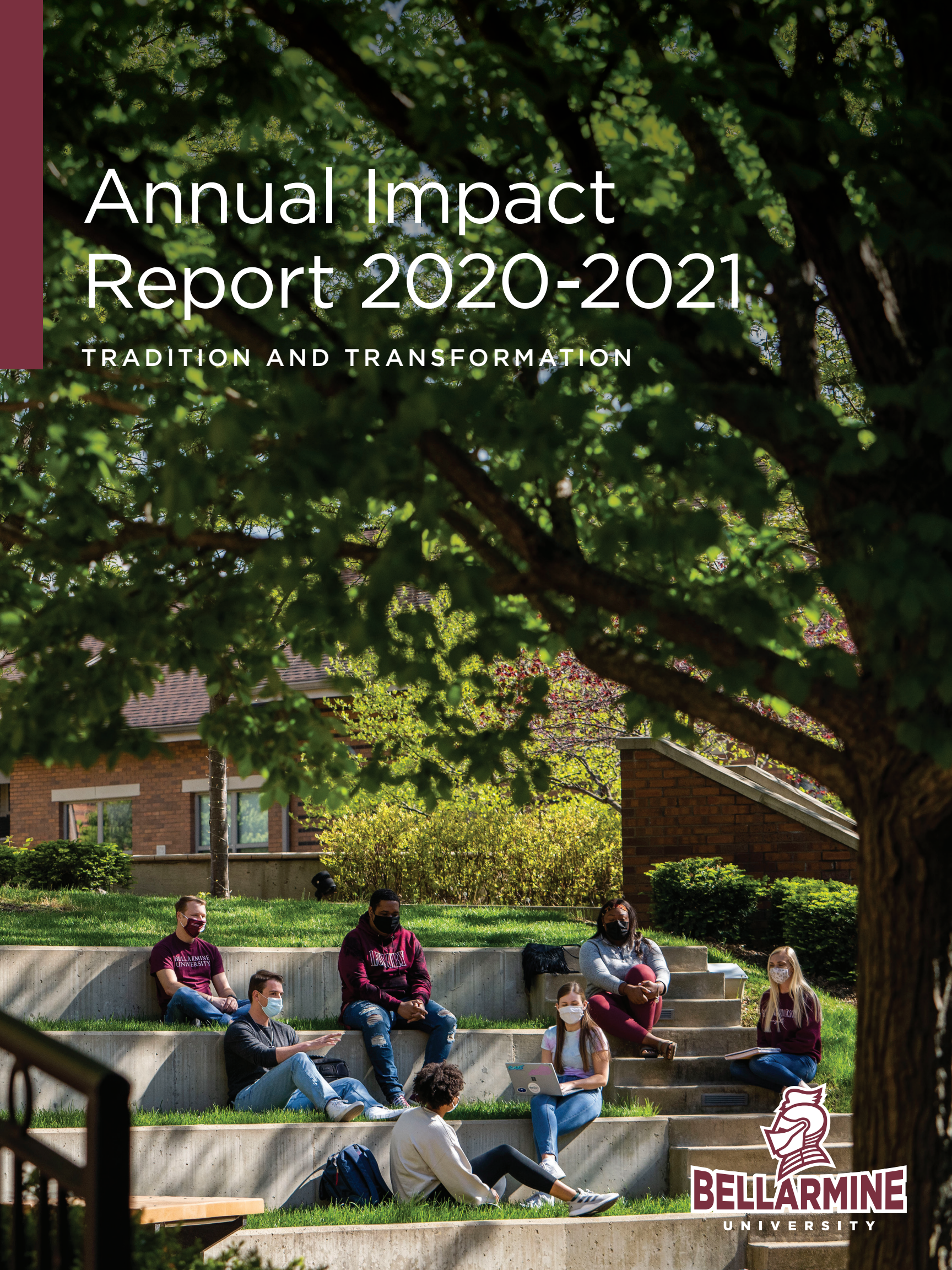


Annual Impact Report 2020-2021

TRADITION AND TRANSFORMATION



BELLARMINE
UNIVERSITY

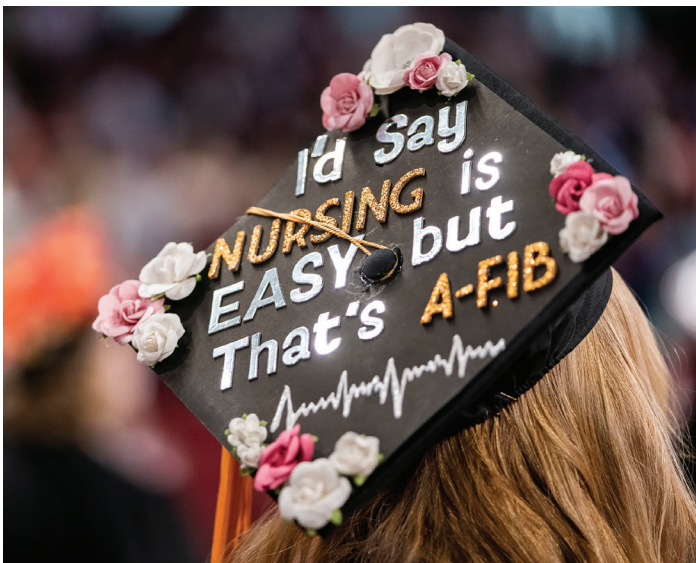
From the Board Chair

I am pleased to present this report of the many successes achieved at Bellarmine over the past year, despite the obstacles created by the pandemic.

As the chair of the Bellarmine University Board of Trustees and president and CEO of Norton Healthcare, I see many similarities between these organizations. The board of Norton Healthcare understands the need to seize opportunities and act quickly. So does Bellarmine President Susan M. Donovan and her Cabinet. Bellarmine's ability to pivot to online instruction at the pandemic's onset was crucial to keeping students on track toward graduation.

At the same time, the university maintained the personal, authentic connections between students and their faculty members that makes the Bellarmine experience exceptional. At Norton Healthcare, we call this "Great Human Interactions," a term coined to describe the way our team interacts with patients, families, the community and each other.

Norton Healthcare believes in Bellarmine—that's why we have partnered with the university for nearly 20 years, and why I am honored to serve on the Board of Trustees.



I must credit my predecessor as chair, Churchill Downs President William E. Mudd '93, for his bold leadership in the creation of Bellarmine's strategic plan, "Tradition and Transformation," and for helping the university forge ahead with the plan's initiatives while managing a pandemic.

Bill was also instrumental in Bellarmine's achieving a major objective of the strategic plan in 2020 when the Knights made the transition to NCAA Division I. This move is elevating Bellarmine's national profile and allowing the university to share its story of academic excellence with a much wider audience.

And make no mistake: academic excellence remains the university's top priority. There is perhaps no better illustration of this than the Knights finishing their first DI season as the Academic Champions of the ASUN Conference.

I could not be prouder of these student-athletes, and indeed, all of our students, who will graduate to become leaders and champions in our city, the region and beyond. Every successful city needs a strong private university. For Louisville, that university is Bellarmine University.

Swords up!

Russell F. Cox
President and CEO, Norton Healthcare
Chair, Bellarmine Board of Trustees



From the President

In a year marked by continued challenges resulting from the global COVID-19 pandemic, I am tremendously proud of the resilience and adaptability shown by every member of our Bellarmine community. The nimbleness we've become accustomed to out of necessity will serve us well in a year that we hope and pray will look more normal. The result will be a Bellarmine that is more entrepreneurial, more courageous, and perhaps more committed to its vital mission than ever before.

Reflecting on the past year, when it often seemed like we were just trying to make it through each day without becoming completely overwhelmed, I am impressed that we were able to make such meaningful progress on the strategic plan, "Tradition and Transformation," that we adopted in 2019.

We have made continued strides in delivering a transformational student experience that is centered on personal attention for each student and a commitment to the development of the whole person – mind, body and spirit. A year of mostly virtual interactions has reinforced for me the value of the on-campus, in-person classroom experience for which we are renowned. I am grateful for the campus community's willingness to comply with health initiatives last year that allowed us to maintain a residential student experience throughout the year, even if that experience was somewhat different.

We have embraced our strategic plan's call for a focus on affordability in higher education with bold pricing initiatives and aggressive fundraising efforts that ensure more students will have access to a Bellarmine education. And we are seeing the results of our commitment to equity and inclusion, with the most diverse entering undergraduate cohort in our university's history.

I am so incredibly proud of every member of our community for playing a part in what was really a remarkable success story over the past year. Our students, faculty and staff redefined what it means to be a Knight by courageously charging into a very tumultuous year. Our alumni were more engaged than any year in our history, despite our inability to host on-campus events. And our generous donors and partners held steadfast in their support for Bellarmine during the pandemic in ways that allowed students to persist in pursuing their degrees. We have students enrolled for the upcoming year who would not still be here without the direct financial support your gifts made possible.

Thanks to the way we faced the challenges of the 2020-21 academic year, Bellarmine is well-positioned for success in the years ahead. I am not surprised by this, but I am grateful for it.

Go, Knights!

Susan M. Donovan, Ph.D.
President

Distinctive, Transformative Student Experience

Bellarmino 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.



2020 Bachelor's Degree Recipient Outcomes

98%

Working or continuing education within six months of graduation

87%

Participated in 90+ hours of experiential learning as an undergraduate student (internships, research, teaching, clinicals)

73%

Remained in Louisville after graduation

RESIDENCE LIFE

Bellarmino kept residence halls open throughout the 2020-21 year with limited COVID-19 transmission thanks to a comprehensive #HealthyAtBU campaign that included testing, contact tracing, quarantines and vaccination clinics.

Housing numbers for incoming first-year students in Fall 2021 have rebounded to near pre-pandemic levels.

RESIDENTIAL STUDENTS	AUGUST 2019	AUGUST 2020	AUGUST 2021
First-Year Students	412	345	404
Second Year*	272	232	219
Juniors	143	140	116
Seniors	110	100	111
Grad./Postbac.	28	13	26
Exchange	11	0	1
Transfer	31	26	33
TOTAL	1,007	856	910

*INCLUDES RETURNING FIRST-YEAR STUDENTS AND SOPHOMORES



RETENTION: STUDENT PERSISTENCE DURING A PANDEMIC

While Bellarmino saw a slight decrease in retention among new students who entered college during the pandemic, retention of returning students was up, in some cases representing the highest numbers in more than 30 years.

CLASS	RETENTION RATE	VS. 30-YEAR AVERAGE
Sophomores (Fall 2020 Cohort)	77.0%	2.7% ▼
Juniors (Fall 2019 Cohort)	76.6%	7.5% ▲ (highest since 1985 cohort)
Seniors (Fall 2018 Cohort)	67.0%	1.9% ▲
Graduate (Fall 2017 Cohort)	59.1%	6.5% ▲ (highest since 1987 cohort)
Transfer (Summer/Fall 2020 Cohort)	81.4%	(12.4% improvement over past 4 years)

Enrollment for Fall 2021

3,147

Total enrollment for Fall 2021, including 2,406 undergraduate and 741 graduate students

58%

Percentage of first-year students who participated in three or more activities

1,875

Graduates from 2020 and 2021 who were recognized during the largest commencement weekend in the university's history

593

Number of students in the first-year class—the most diverse in Bellarmino's history (See priority 3 for details)

Student Support Center

4,070

Academic advising appointments conducted by SSC advisors, who met at least one time with 100% of their students (all first-year and transfer students, plus second-year students in select majors).

Career Development

92%

Percentage of 2020 bachelor's degree recipients who are pursuing full-time opportunities in their career field of interest

Academic Innovation and Excellence

Bellarmino 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 or enhanced the following academic programs:

- Launched Master of Health Science in Biomedical Sciences
- Health Professions Education certificate program
- Bachelor's degree in Neuroscience
- Bachelor's degree in Environmental Justice & Sustainability
- Bachelor's degree in Integrated Studies (degree completion initiative)
- Women of Color Entrepreneurs–Leadership Certificate (non-credit)
- Ph.D. in Health Professions Education and RN-to-BSN programs now entirely online

A bold new **Strategic Plan for Rubel School of Business** will guide the school's growth over the next four years, with a vision to be a hub for transformative business education.

FEDERAL GRANTS TO ENHANCE ACADEMIC EXCELLENCE THROUGH NEW INITIATIVES:

New STEM Career Pathways Scholarships

National Science Foundation • \$988,470

This four-year scholarship program will recruit low-income, high-achieving students into the STEM disciplines of computer engineering, computer science, mathematics and data science.

New Degree in Health, Culture and Compassion

National Endowment for the Humanities • \$100,000

This interdisciplinary bachelor's degree in Health, Culture and Compassion connects the humanities to health and senior-living fields. It will become the only such program in Kentucky.

Academic Enhancement

\$1.5M

Federal grants for new initiatives to enhance academic excellence (includes Veteran Student Success grant under priority 4)

University Rankings U.S. News & World Report

206

Overall ranking among national universities

154

In social mobility for economically disadvantaged students

University Rankings Niche.com

TOP 50

Catholic Colleges in the U.S.

New Programs

6

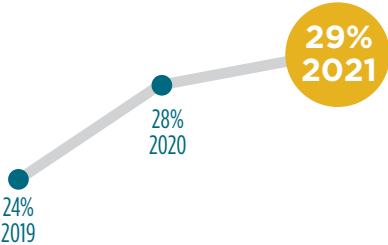
New academic programs — additionally, two programs were moved online

Geographical and Diversity Expansion

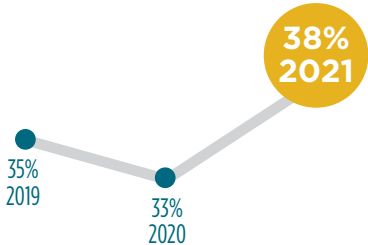
Bellarmino will expand its geographic reach to enhance reputation and impact through enrollment pipelines, athletics, alumni engagement, and outreach.



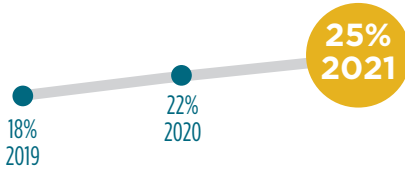
Percentage of Pell Grant-Eligible



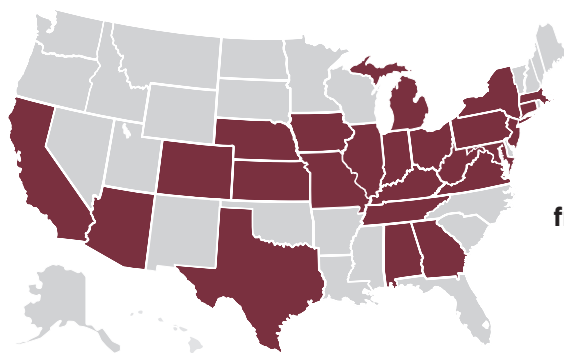
First-Generation Students



Students of Color



FIRST-YEAR STUDENT PROFILE	2019	2020	2021
Male/Female	35/65	37/63	34/66
From Kentucky	69%	69%	71%
Average SAT/ACT Composite	24.8	24.7	24.2
Median High School GPA	3.71	3.71	3.72
Honors Program	16%	17%	15%
Percentage of Student-Athletes	22%	19%	20%
Legacy Students (Sibling, child or grandchild of alumni)	14%	15%	14%



First-year students come from 24 states and 9 nations

Top Religious Affiliations: Christian: 30%, Catholic: 27%, No Preference: 8%, Baptist: 7%, Other: 3%.

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

TRANSFER STUDENTS

81 new transfer students in Summer/Fall 2021 (vs. 52 in 2020) - the highest number of transfers since 2016

Top five majors: Nursing, Exercise Science, Psychology, Business Administration, Communication

Top three previous institutions attended: Jefferson Community and Technical College, University of Louisville, University of Kentucky

GRADUATE AND SECOND-DEGREE STUDENTS

- Summer 2021: 251 new students enrolled (vs. 284 last summer)
- Fall 2021: 183 new students enrolled (vs. 194 in Fall 2020)

A new **Graduate Student Assistantship Program** will promote a graduate school culture and provide a new means of financial support for students, with 12 initial participants working in offices across the university.

BELLARMINE RISING

- » Inaugural season as NCAA Division I program for all sports
- » Men's and women's basketball moved to iconic Freedom Hall
- » Earned ASUN Academic Champion Trophy in first year
- » Men's basketball qualified for postseason CBI tournament bid



Expanding Awareness

7B

Bellarmino's total local and national media impressions — a 205% increase over the previous year

2.7B

Athletics media impressions for the Knights' first NCAA Division I season — a 263% increase over 2019-20

Alumni Connecting with Students

6,242

Alumni from across the nation engaged through in-person and virtual events (record number)

340

Current students matched with an alumni mentor — a 24% increase over the prior year

Student-Athletes

#1

ASUN Academic Champion
In its first NCAA Division I season competing in the ASUN Conference, the Bellarmine Knights finished atop the conference's academic standings for student excellence in the classroom

88%

Percentage of student-athletes earning a GPA of at least 3.0

Commitment to Equity & Inclusion

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.





In an academic year with heightened awareness of justice issues, Bellarmine University made measurable progress on the equity and inclusion commitment that is a major pillar of the university's strategic plan, empowering all members of its increasingly diverse community and supporting them to achieve their full potential. The foundation we are laying provides a strong blueprint for us to fully operationalize our mission.

With support from the Chief Diversity, Equity and Inclusion Officer, the President's Advisory Board on Equity and Inclusion and Human Resources, Bellarmine:

- Completed a campus accessibility audit during the Spring 2021 semester, focused on improvements in climate, technology, physical resources and accessibility as an important aspect of diversity
- Launched a new internal grant program to support diversity, equity and inclusion initiatives
- Finalized a new affirmative action plan, with new trainings and resources under development to support that plan's implementation

CAMPUS PRIDE INDEX

Bellarmino earned 4 out of 5 stars on the Campus Pride Index, the highest rating of any private liberal arts institution in Kentucky in a nationally recognized metric of support colleges and universities show for LGBTQ+ students.

CENTER OF EXCELLENCE FOR VETERAN STUDENT SUCCESS

U.S. Department of Education • \$360,000

The only one of its kind at a private school in the region, the new Center of Excellence is becoming a model of service and support for veteran students, bolstering their entire academic journey – from acclimating to university life to progressing successfully through coursework to degree completion.

Veteran Support

\$360K

U.S. Department of Education Grant to support Center of Excellence for Veteran Student Success (only one of its kind at a private school in the region)

Accessibility Audit

Completed a campus accessibility audit, focused on improvements in climate, technology, physical resources and accessibility as an important aspect of diversity

Professional Development

96%

Completion rate by first-year students (Fall 2020 cohort) for new Diversity, Equity and Inclusion training module; 86% completion rate for faculty and staff

14

Guest lectures on Diversity, Equity and Inclusion

Mentors and Growth

40

Mentees in re-envisioned Knights of Color student mentor program

DEI Grant

Launched a new internal grant program to support diversity, equity and inclusion initiatives

Meaningful Engagement & Partnerships

Bellarmino 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.



BELLARMINE CENTER FOR STRATEGIC PARTNERSHIP

The university's cross-collaborative Strategic Partnership Team pursues high-value, mutually beneficial opportunities for partnership. Key initiatives launched by this team in 2020-21 included:

Butterfly Project at Central High School

This data science internship and community engagement program pairs students from Central High Magnet Career Academy and Bellarmine into teams that use data to find solutions to social challenges in education, health, housing, jobs and justice. Partners include the Louisville Urban League, Humana and Microsoft Future of Work. The resulting data will be available to community organizations to support their work.

BELLARMINE CENTER FOR COMMUNITY ENGAGEMENT

This new initiative leverages university expertise and resources to meet unmet needs in Louisville and the surrounding region while helping students connect with meaningful, purpose-driven work and experiential learning opportunities. Signature initiatives include:

Bellarmine Pathways, Knights Lighting a Path for College

Bellarmine students share knowledge gleaned from their college experiences with Kentucky middle and high school students. In small group sessions, they cover subjects such as wellness, financial literacy, identity development, time management, communication, study skills, involvement and major/career exploration.

Bellarmine Bonner Leaders Program

Bellarmine Bonners serve as part-time employees at nonprofit organizations, schools and government agencies that address community issues. Students are paid through the university's work-study program and receive training sessions, workshops and weekly seminars that address social issues and cultivate career-readiness skills. Bellarmine is the only university in Louisville to offer this national program.

Bellarmine RISE (Road to Ignite Student Excellence) Tutoring Program

Undergraduate students tutor local kindergarten through -12th-grade students to help them meet academic proficiency levels. Bellarmine students who successfully complete tutoring training through Metro United Way receive the National Tutoring Certificate.



Metro United Way

Enhancing Access & Affordability

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



Support from Our Community

\$110,000

Gifts from faculty and staff

\$431,000

Record amount raised in 24 hours for annual Day of Giving



NEW LEADERSHIP

Daniel Frockt became Bellarmine's Vice President for Finance following a national search to replace longtime VP for Administration and Finance Bob Zimlich, who retired. Frockt, who was previously Louisville Metro Government's Chief Financial Officer, brings extensive financial-management expertise that is helping the university implement its strategic plan, launch community engagement and partnership initiatives, and deploy new academic programs.

ACCESS & AFFORDABILITY INITIATIVES LAUNCHED IN THE 2020-21 CYCLE FOR STUDENTS ENTERING IN FALL 2021:

Public Price Promise

The Public Price Promise is like few other scholarships in the country. It matches the direct cost of qualifying undergraduate students' state flagship university for tuition, fees, room and board, typically reducing the cost of attending Bellarmine by as much as half. It allows more students from across the nation to receive Bellarmine's distinctive private, liberal arts education within a small, close-knit community for the same price as attending a large state school.



OnCourse

Bellarmine University has taken steps to ensure that all undergraduate and graduate students will receive all required books and other educational materials at a reduced cost as part of their tuition.

OnCourse ensures that all students have the materials they need on the first day of classes at a reduced cost, increasing the likelihood of academic success.

STUDENT FINANCIAL AID

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

- Invested more than \$68M in institutional aid
- Invested more than \$18M in first-year institutional aid
- Launched the Catholic High School Scholarship for first-year students who graduated from a Catholic High School with a GPA of 3.0 or higher, with 22% of the first-year cohort qualifying
- Implemented an undergraduate tuition and fee increase of 1.5%, consistent with previous year (additionally, the new OnCourse textbook program was added to tuition cost)
- Once again did not increase room and board rates

Institutional Aid

\$68M+

Bellarmine's total investment in institutional student aid

\$18M+

Bellarmine's investment in institutional aid for new first-year students

\$6.7M

Total donor financial support, including cash, pledges, sponsorships and grants

Athletics

\$2.2M

Athletics gifts and sponsorships in inaugural NCAA Division I season

Annual Fund

\$2M

Support for student assistance

New Pipelines

23

Number of students attending Bellarmine through a new transfer agreement with Jefferson Community & Technical College

7

First-year students arriving from local high schools as Louisville Century Scholars, a competitive scholarship covering full costs

