

TEMPLE UNIVERSITY  
**FACULTY SENATE STEERING COMMITTEE**  
 Minutes

**Date:** Tuesday, 10/18/2016

**Time:** 1:00pm – 3:08 p.m.

**Present:** Michael Sachs (Pres., CPH), Tricia Jones (Past-Pres., SMC), Elvis Wagner (Vice Pres., COE), Sue Dickey (Secy., CPH), William Cabin (SSW), Donald Harris (LAW), Michael W. Jackson (STHM), James Korsh (CST), Sharyn O'Mara (ART), Cornelius Pratt (SMC) Jeffrey Solow (BCMD), Ken Thurman (COE.), Kimmika Williams-Witherspoon (TFMA), Paul LaFollette (*Faculty Herald*, CST), Jie Yang (KSoD), Teresa Gill Cirillo (FSBM), Raghbir Athwal (LKSM), Kurosh Darvish (Engr)

**Absent:** Donald Hantula (CLA), Cornelius Pratt, Melissa Ranieri (Pharm), Cheryl Mack (Coord.)

**Excused:** N/A

**Guests:** Ken Kaiser, CFO (1:00 pm) & Valerie Harrison, Senior Advisor for Compliance (2:00 pm)

Topic	Discussion	Action
1. Meeting called to order at 1:00 p.m.	Meeting called to order by Dr. Sachs. Agenda reordered so that guests could speak.	Meeting called to order at 1:00pm.
2. Guest: Ken Kaiser, Chief Financial Officer & Treasurer, TU (1:00 p.m.)	<p>Thank-you for inviting me. Please see forwarded outline &amp; summary of RCM.</p> <p>Current Status of RCM</p> <ul style="list-style-type: none"> <li>• History and Principles – Things have been changing regarding the funding of TU &amp; higher ed in general for more than a decade prior to this change that occurred when past President Theobald came. There are a lot of pressures on funding, especially with commonwealth funding. In 2009, that PA government recommended a 50% drop in funding for TU. Other points:             <ul style="list-style-type: none"> <li>-student debt = #1 debt in U.S.</li> <li>-students (&amp; parents) questioning the value of a degree</li> <li>-questioning this expenditure based model</li> </ul> </li> </ul> <p>Our RCM values are that our budget:</p> <ol style="list-style-type: none"> <li>1. Is mission driven.</li> <li>2. Aligns authority with responsibility &amp; accountability.</li> <li>3. fair to each of the schools &amp; colleges, but more importantly, our STUDENTS.</li> <li>4. Encourages innovation, entrepreneurship &amp; efficiency.</li> <li>5. Is based on simplicity. We are hoping to make this easier.</li> </ol>	

THOUGHTS:

Schools get to keep the \$\$ they generate. Research. Non-credit activity. Strategic funding.

Each year, we sweep out \$7 million from each school & college so that we can shift some of the \$\$ to where less comes in. The Faculty Senate Budget Committee was involved with this for the past 3 years. Money gets taken out; some may get put back in, depending upon need.

This redistributes things.

Law schools nationally: Their budgets are in the toilet. Struggling everywhere. Enrollment has continued to go down. If it ever gets back up to where it was pre-recession, it will be incremental over time & the money will get shifted to other schools that are in greater need.

There are 3 expenses for all schools & colleges from the resource pool: salary, benefits & travel funds. There are other costs. One of 2 assessments goes for financial aid & plant development.

Support centers with Allocated Cost Drivers: Someone has to pay for all of the expenses. We needed simpler ways of computing this. We moved units that behave similarly to the same 'bucket.' If you have a lot of Undergrad credit hours, which are the larger proportion of this bucket, your school will pay. The graduate & professional schools will ask "why am I paying anything?" We can't have people opting out. It's fair. Without the undergraduate students at TU, there would be no med school or health system. Another necessary expense is that for campus safety which protects students & employees. This is a 50/50 allocation. However, they spend more time dealing with undergrads than employees. Should it be based on residence students? That is a question, but it is an unreliable metric. The numbers for incidents move around & that would wreak havoc on people's budgets from year to year. This question has gone back & forth among the deans for the past 1.5 years. Who are your customers? That question helps inform this process.

Q: JK: It's not obvious how RCM addresses this any more than the old system.

A: There was no strategy behind old budget. Didn't reflect plans or strategic direction of the U. Without market pressures & everything fine, it worked for many years. There was a 4.9-5.9% increase in tuition every year. We did it based on no particular formula because people paid. Everyone was happy with increases at those clips until:

-2009.... Everyone was paying attention to everything.

-State appropriations were really threatened. We did get funded, but our previous

appropriation is down by ~17% since that time.

-RCM aligns accountability & authority. When programs lost money in past, it was absorbed. The flip side is that when a dean flexes muscle & forces a program on faculty that then fails, there is loss of money... but the program's success is traced to how its managed & how it's done. The question is, what other things can be done to offset programmatic losses?

-RCM really incentivizes rational behavior. In the old way, each school & college got the same amount as last year + salary increases. RCM is different: It is based on your school's activity.

-Every year, summer school ticks down at TU. So we said let's run summer just like RCM. Revenue & enrollment went down but SS made > \$2 million more than in the past b/c expenses were drastically cut. Now that schools are getting the benefit, more accountability. This is a major change on expense side.

-incentivizing entrepreneurial activities b/c school will keep the revenue.

-budget was formerly an opaque, black box. That income was used to subsidize other schools.

-That financial aid issue would never have risen to top in previous mode because it wouldn't have been noticed. \$22 million is a lot to cobble together. Can't do it in a black box, and so it became known.

Q: Shouldn't people have been looking for that before?

A: People tried to look in the old budget model but couldn't understand it.

Q: KT: If you go back to the retrenchment crisis in the mid-1980s, nobody was looking @ income; only expenditures.

A: I don't know. Might have been something to which they were alerted earlier. Now, the schools & colleges are not stuck with decisions that you don't really own. Pushes the authority & decision making to the units that have to live with them.

Q: JK: We now have the same problems with 17 minor administrations doing what was done before.

A: It is now distributed so that each school can make decisions independently. In 2009, we pulled out the playbook & put out a travel ban, etc. Now these decisions are local.

Q: To me, I take that risk every day in my school.

A: The Provost can't possibly get to know the +/-'s in each school's decision.

Q: In one of previous President's universities, the arts were well taken care of @ Indiana University. This is not happening at TU.

A: The Arts get a \$20 mill subsidy with RCM, but from that jumping off point they need to manage it. This is a 'hold harmless' provision. The Med school got a lot of \$\$\$. The CST got \$\$\$. The 3 schools that didn't get \$\$\$ were Dental, Pharmacy & Public Health. They did NOT GET \$\$\$.

Q: JS: Costs are going up aren't they?

A: In the old model, you decide for yourselves. #1 expense driver = 2.5% /year with salary & benefits. This encourages efficient operation. New programs are developing. In Indiana, RCM = disaster for some disciplines. They are offering classes, for example, to non-music majors to subsidize the low enrollment (by design) majors.

Q: SO: If a school or college was already running at a deficit, that traveled with us.

A: Everyone in all the schools & colleges was made whole on day 1 of RCM. Completely indifferent on budget model. If your dean isn't someone who doesn't like to engage the faculty it makes it a lot more difficult.

Q: SO: Our program = #2 in country, yet we have insufficient allocations to manage it at this time.

A: Leadership of the school & engaging the faculty is the key to improving your situation.

Q: We've been as entrepreneurial as we can get but at the end of the day, we're the arts. Very little recognition of the cost to get there. We need advocacy for the funding of the arts.

A: Mechanism to SHIFT money among the schools.

Q: JS: In Boyer, past 10 yrs., little by little level of students was going up. Then RCM kicked in, & the only way to increase income was to bring in more students. TU has always been a "fallback" school as far as talent. Bringing in weaker & weaker students as this rolls along. We've started a 2<sup>nd</sup> orchestra for weaker students to fill it out & it's made up of non-performance majors with no standards of admission. Indiana University has a lot more teachers to teach all these people. I now have to teach these students. It is demoralizing to have to teach students who should never have been admitted. There are several grad students from China who should never have been admitted. Dr. S said we need 25 more paying violin students.

A: I can't comment, really. I can't correct that. Not everything that's happened is b/c of RCM. The budget is still the budget. I don't know that this wouldn't have been prevented.

Q: PL: Doesn't this lift the burden on the central admin for fund raising?

A: Absolutely not.

Q: JK: How did you overcome the \$22 mill deficit?

A: I have slides about that in this presentation:

- Funds Flow – Iterative process with 5 guiding principles (mentioned above).
- Allocated Cost Trend – went up 6.9% & benefit expenses went up 3.8% (rate with the feds). Over-recovering for many years. Feds said that you need to adjust their benefit rate so that you pay us back. We are currently in Fiscal Year 2017, & benefits have gone down in the budgets. This is driven by collective bargaining.

All benefits administrative costs went up 1.4%. Working hard to get the costs down. If I add 5 people in HR now in RCM, the business managers in the s's & c's all managers want to know about it for accountability. Everyone pushes to keep costs at a minimum throughout the university.

- Assessments for

1. financial aid 17.6 to 18.4 %

2. \_\_\_\_ (I missed this point, with apologies!)

3. Plant development budget went from almost 5% to almost X%. Not exciting stuff, but building depreciation occurs. Generates about \$38 mill/year expense to keep campus in good working order.

- RCM 3 Year Review: Timing and Process.

Was scheduled to start as we speak. Seems odd to do it in year 2! Therefore, deferred. 2 budget skip. The leadership changes this summer created a delay. Want to get new Pres & Provost up to speed b4 we start. Want some other external reviewers appointed.

-Key: Faculty Governance Committees. RCM works very well in some schools. In others, it's a real concern & it must be raised as a concern, 100%.

Q: At one school, this committee is picked by the dean.

A: Maybe some of these should committees should be elected. John Curry, who is the 'godfather of RCM' will be our new external reviewer. The former one was Doug \_\_\_\_.

John would be the person you would be talking with as members of the Faculty Governance Committees. This is a high touch, high outreach process. Looking for leadership of the Faculty Senate to nominate smaller groups to sit with John's team during the review. He will come back to present. We will synthesize. There will be complaints about the budget. Some will not change; others will! Other unintended consequences??? We didn't want to just do a 3-year review.

Q: KWW: Under RCM, b/c schools have to pay for everything. In our building, we have no Wi-Fi; no classrooms (since they exploded Barton). We are trying to teach Theater in Ritter Annex. When parents & students come to campus & see the facilities with which we have to work, who would want to come here!?

A: With facilities, RCM won't really address the heart of it. It will help schools doing well to improve. This is where we have to have the "greater good" discussion. Can these facilities issues be addressed by the plant development fund? If facilities are that poor, they need

to be addressed. Kevin Clark is going through that now.

Q: KWW: We now miss the horrible (Barton Hall). If there is true fairness across the board, then everyone has to be even...

A: Everyone will be held harmless. We are not even. When we started RCM, some schools were better managed before. On day 1 (RCM/preRCM) the budgets were exactly the same.

Q: KWW: We have a study abroad program. We were told we could not charge more than \$8000 per semester for tuition for this. We were limited to \$8000 when other schools charging \$12K!

A: We would encourage you to charge more if you could!

Q: KWW: I will have our Associate Dean, Doug Wager, call you.

A: Have him call me.

Q: KWW: What IS the mission? If we are taking students who come to the program with less talent....to make enrollments that provide more income....

A: If the Deans require more admissions with less quality, this can become a problem. Not sure that quality is deteriorating, except for maybe in the arts, but it's not true for TU in general. In the old budget, who knew what the priorities were? Who knew what the model was? Now the units who are improving their student bodies are doing well. The only thing that we regulate is tuition.

- Overview of FY2017 Budget and Financial Status (Please see incorporated & combined discussion below).

- Financial Aid

The unexpected calculated amount was really not \$22 million; it was actually \$20.5 million. It's a two-year issue. Last year we noticed a problem, which was a ten-million-dollar problem. There was no thievery or dishonesty going on here. The program was a victim of its own success. There were ~1000 incoming freshmen. The number of students receiving aid was more than that! Even in my own community, parents were coming up to me & telling me "My kid's coming to TU for free!" The changing landscape of more talented students creates a \$22 million financial aid package. The fallout was more of a personality problem than the Financial Aid issue. That cash came for IELP (Intensive Language Program). Other places for cuts: Central efficiencies. With next year's budget, must make up \$7.5, plus seeing what happens with state funding. Spread over 2 years. It IS a real issue. Not offset by increased revenue. What revenue increases do you have when you have more students but they're all getting scholarships? This is a free ride. We have now put caps at every level of the program. If there are 2 people who look alike academically, one may get funding; one may not. The Provost's office looking at this. There is need based & merit based aid. Pell & PHEAA. If Pell & PHEAA go up in smoke, more TU money will go to merit scholarships. International student scholarships will be capped. Full scholarships don't make sense. But \$1000 scholarships make sense b/c they pay you \$26,000 in tuition from the student. Also, nobody asked if the 6000 incoming freshmen ALL QUALIFY? There will be

	<p>caps!</p> <p>Thanks! Follow up questions. Have Doug call me &amp; I'll be happy to meet with both of you.</p> <p>Q: JK: Can we have copies of the slides?  A: I will send them to Cheryl.</p> <ul style="list-style-type: none"> <li>• Merit Award Trend –Have heard some wildly inaccurate things so will present facts.</li> <li>• Changes for fall 2017 and beyond</li> </ul>	
<p>3. Valerie Harrison, Senior Advisor for Compliance &amp; Andrea Seiss (2:00 pm)</p>	<p>Thanks for inviting me!  Passed out paper copies of her ppt presentation &amp; also pens. "Gifts!" Every time we come, we're going to bring something to you to give you an idea of what we're trying to do about educating this community about sexual misconduct &amp; the issue of consent.</p> <ul style="list-style-type: none"> <li>-We sometimes wonder, should we get someone to write, "I agree"?</li> <li>-Always ask; always listen.</li> <li>-We would never leave each other when we went out. Trying to create a more communal culture.</li> </ul> <p>Best practices.  -IDEAL; EOC &amp; Title IX now all under one umbrella.  -Introducing Andrea (Caporale) Seiss as the new Title IX coordinator. Email address = <a href="mailto:andrea.caporale@temple.edu">andrea.caporale@temple.edu</a>  I work with students who experience gender discrimination &amp; sexual misconduct.</p> <p>Andrea Seiss: Thank you for letting us come &amp; talk. Education is our biggest thing. Domestic violence, stalking, sexual harassment &amp; other things of this nature. I speak with all orientation groups. See slide 4. We respond promptly when complaints come in. (Within 24-48 hours, a conversation takes place). We provide interim measures: for example, with students filing complaints about another student who is in a class with them; what accommodations should be made? Difficult. Rights of both students. Complaints are not = to a finding of responsibility. Impartial investigation. This is an administrative investigation. Police process is separate from a U process. Some decide NOT to go forward with the police, but we as an institution still need to investigate. We have 32 trauma informed, trained investigators at TU now. Can't let cases get stalled. We have a retired PA. Supreme Court justice who comes in &amp; hears these cases. She handled 26 cases for us in the 1<sup>st</sup> year. All liked that she was not a U employee. Following a conduct process, we need to make sure that there may be permanent academic accommodations that meet the complainant's and others' needs. Sometimes an entire residence hall floor is part of how this plays out. Do students &amp; faculty have the resources &amp; education to make this a better situation? Keeping track &amp; records. Watching for patterns. Especially for recurring complaints about one specific campus or off campus location.</p> <p>Valerie: There can be significant consequences IF we do not do this. Some universities don't get it right, and the ultimate sanction is not getting federal financial aid. Respondents are also filing</p>	

civil law suits, saying they are not getting fair treatment. We are trying to get faculty & other staff involved. We do provide all kinds of services. We tend not to be focused on the respondent to balance that so that there is less unfair treatment. Males often say that they're not getting fair treatment. School reputations are at stake, for example, Baylor & others. Spending time with lawyers, defending our University, is really somewhere where we don't want to be.

Current stats: We've had 38 complaints of some sort of misconduct since beginning of semester. Could be offensive jokes, domestic violence. 26 resolved. Could be that the person was found responsible & sanctioned. Sometimes, they switch rooms & do something that satisfies both parties. Some go to the DA. None so far this semester has gone to the DA.

Q: KT: What obligation do you have to report to DA?

A: Basically all. We work with SVU & may need a rape kit. Some say that they only want the process to be managed at TU. However, this kind of request must be balanced at University level, keeping the broader community safe. If we know that some student has problem behavior, we can't always ignore it. It must be balanced.

Q: MJ: How can you control confidentiality? One faculty member was just reprimanded by his dean for having a conversation with students about something that happened.

A: Such conversations can be a FERPA violation. Another issue: defamation. Don't go rogue & talk about things that you've been asked not to. That's what we try to advise. Follow the policies & maintain the students' confidentiality.

Q: TWW: What if there's an incident & you have to report to your chair?

A: That's different. You must report.

Q: DH: Do I have access to the records if asked to write a recommendation?

A: The Dean of students has to sign off that there is not a disciplinary record. They have to submit something.

Q: PL: Is this process the same if there's an issue between students & faculty?

A: It's basically the same. We work with WOAR & others. See slides. Prevention & education. Would like to show the video. We just did something that we call *The Clothesline Project* in the Founder's Garden: victims & survivors made t-shirts. Stories told through art. Go through OLL on sexual misconduct. In concert with the Wellness Resource Center. It's ON Us (started by President Obama). Our video was featured & won 1<sup>st</sup> place at the game this year. National statistics: 1 in 5 women; 1 in 16 men are sexually assaulted in college. It's on all of us.

<http://itsonus.org>

As we do our job better, the referrals go up b/c you're doing a decent job getting people

	<p>comfortable enough to go forward. Highest incident numbers occur in August through November in the younger students. Then there's a lull. Then they go up in April-May (more upper classmen). Getting ready to leave? Off campus parties. Better weather. Newer freshmen. Partying a lot.</p> <p>Q: TC: Are there reports coming from bystanders more often? A: Reports come less from bystanders, but usually come from the victims themselves.</p> <p>Valerie: There is never a dispute about whether the act happened, but someone wonders, "did I have the capacity to consent?" These cases are hard for the judge, but she usually comes down to it. Really hard to determine.</p> <p>Tracking the conduct data back to 2006. 52% of the cases had a 'responsible' finding. We've seen an uptick with the Tinder APP (whose purpose is to hook up. Service is available). It's a prostitution app.</p> <p>Q: MJ: Bystander intervention. We need to expand on the self-defense program for women. This increases a young lady's confidence. Part of orientation or intro classes. Self-defense for women. Teach basic response techniques.</p> <p>Q: KT: Wondering where we stand in the area of people with disabilities &amp; ADA? A: Andrea is also the ADA coordinator, so we will specifically target removing barriers for members of communities who we believe under-report. She works with the office of Disability Resources.</p> <p>Q: KT: There is probably under-reporting, especially among faculty for people with disabilities. We will be developing a questionnaire.</p> <p>END OF DISCUSSION.</p>	
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<p>4. President Michael Sach's Report</p>	<ol style="list-style-type: none"> <li>1. Do we want to invite Ken Kaiser to Nov. 16<sup>th</sup> Faculty Senate meeting? JS: That would be great! So yes.</li> <li>2. There is a lot of lobbying pressure to respond to the board that there have been 5 major decisions about central university leadership without faculty input. What is your take? I can generate a letter.</li> <li>3. 2<sup>nd</sup> related aspect: do we want to make a comment about the search process that will presumably take place next year?</li> </ol> <p>Q: TC: –I'm curious about why, if there's a search planned for next year, was he appointed President?</p> <p>A: Presents a better pic externally? I think that this may have been a pat on the back.</p> <p>Q: Why didn't they appoint him President right away?</p> <p>A: This was a pretty quick dismissal of Neil. Now the BOT has had a couple of months to think about it.</p> <p>Q: JS – We should ask them about our being involved when we have the real search. We can understand that these decisions were all made very quickly, but don't write the complaint that we weren't involve as the main point of the letter.</p> <p>Q: KT – How does he feel that communication between faculty &amp; the BOT can be improved? (without putting him on the defensive).</p> <p>Q: EW: Why are we being so conciliatory? All these people were changed with no faculty input. In my take, it's an egregious lack of consideration for the faculty. Why do we have to step back?</p> <p>Q: KWW – What would be the point of agitating him before he come?</p> <p>A: EW: WE need to tell HIM that this is not appropriate. We also need to be sure that we're not becoming a laughing stock for not having taken a stand.</p> <p>Q: JK: I'm passing out some sentiments on paper that I'm concerned about.</p> <p>Q: JY: I agree. I don't know what we're afraid of! This is sort of like a dictatorship.</p> <p>Q: JS: As I understand it, the BOT doesn't have to consult us on anything. I recommend registering our displeasure after we talk to him. Before David Adamany was selected as president, how many faculty members were on search committees? Wasn't it a substantial number?</p> <p>A: PL: If you recall, there was wild disbelief when it was announced that there would only be one faculty on the search committee at that time. Then, Ann Van Sant agreed to go</p>	
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ahead & be on Adamany's search committee. She was then appointed to a role in the President's office. This is not a normal standard of behavior in most institutions. IN most schools this wouldn't happen. We feel that this is wrong & short sighted.

KWW: We've watched the board do away with faculty government over the time I've been here (20 years). Yet, the university is still paying Theobald to finish out his contract. Not that upset with the elevation of Dick without this committee. Those BOT members appointed through Harrisburg can be the ones to use those BOT members to our benefit. Through the appointing legislators. Once we ask him these questions about faculty government, let him say it publicly & let *The Faculty Herald* do its thing.

Q: DH: If they continue to do this & we don't say anything, at least it puts them on notice & we know where they are. Issues are related but not the same. Since I've been here, I've been hearing a lot about faculty governance. We should wait & hear his view first & be less concerned about putting him on the defensive. Gives him time to think about it. Have him come here & see what he has to say.

A: MS: Went to Dick & Joanne & they are on board with faculty governance. The bad news is that this is all new stuff to the Executive Committee of the BOT. Members of the Exec Committee also didn't seem to know the diff between the Faculty Senate & TAUP. Do we do this now or do we wait 3 weeks?

Q: TC: I agree that we should not ignore, but it might be prudent to say, what is your take on how we should work together? If we put him on defensive, he wouldn't say anything.

Q: MJ: he wouldn't anyway (attorney!)

Q: JK we have no way to communicate with the BOT. I'm sure that there are people on the BOT who have no idea about what's going on. He's going to tell us nothing. We won't get it if we don't exert pressure & say what we feel. They don't want a public fuss & uprising at TU. This is a serious thing that we can use. If we don't use this, we won't get it.

Q: KWW: I disagree. We had a meeting with Vincent Hughes. We can pressure through these state Senators & representatives.

Q: JY: If we don't put on pressure, it will never change. We don't expect them to change, but let's do it! I think that all the BOT members would like to see what the faculty is feeling.

Q: PL: If we let him know in advance, he can't claim that he's been blind-sided. I would like to start this endeavor in a firm but gentle fashion.

A: MS. We can start with the draft of this letter.

Q: TC: my concern is that he will cancel!

A: MS: There is not a time pressure. The presidential search committee is not to be formed until next summer.

	<p>Q: We need to separate the provost from the president issue. We actually gave him Joanne's name to replace HLD. When they appointed D. Englert, they didn't do something extraordinary. He had already served. They really didn't do something out of whack. Separate the issues of provost &amp; president.</p> <p>A: It's the pattern of these 5 things about which we were not consulted.</p> <p>A: We gave NT names before we were asked about nominations for the replacing provost.</p> <p>A: TB: these people were very clearly put forward by us for the role of INTERIM provost. We were not considered about making anyone a permanent provost.</p> <p>Q: MJ: Can we get a list of who is on the BOT?</p> <p>A: This is on the website. We will get copies for the next meeting.</p> <p>MJ: We should all get new t-shirts that say: faculty lives matter! ☺</p>	<p>We will work on the letter &amp; distribute it to the FSSC, along with whether or not it should be sent as amended.</p>
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5. Vice President's Report – Dr. Elvis Wagner	Full report prepared. No time for report during this meeting.	
6. Old Business	None.	
7. New Business	None.	
8. Adjournment	Meeting adjourned.	Adjourned at 3:08 p.m.
Respectfully submitted, <i>Sue Dickey</i> Sue Dickey, PhD, RN, Associate Professor & Faculty Senate Secretary, 2016-17		

Next meeting: Representative Faculty Senate, Wednesday, November 18, 2016  
FSSC, Tuesday November 1, 2016

SBD/sbd 10-22-16

- Current Status of RCM
  - History and Principles
  - Funds Flow
  - Allocated Cost Trend
  - 3 Year Review: Timing and Process
- Overview of FY2017 Budget and Financial Status
- Financial Aid
  - Merit Award Trend
  - Changes for fall 2017 and beyond