



# Bailey Scholarship Program Review

A report to the  
University YMCA Board of Governors  
October 21, 2009

At its April 4, 2009 meeting, the University YMCA Board of Governors discussed both the desire and need to review, update and better integrate the Bailey Scholarship Program within the University YMCA. At the conclusion of the discussion, the Board voted to establish an Ad Hoc Committee that would meet during the summer months and report back to the Board of Governors in the fall of 2009. In its charge to the Committee, the Board directed the Committee to use the following principles to guide its review and recommendations:

- 1) *To more fully integrate Bailey Scholarship program into University YMCA infrastructure and programming*
- 2) *To develop/encourage a more mission driven emphasis within Bailey Scholarship Program*
- 3) *To redefine public perception and awareness of Bailey Scholarship Program*

The Bailey Ad Hoc Committee included Tom Seals, Chairman; Mary Beastall, Fred Mastny, Adrienne Harris, Liz Czys, David Thies, Chuck Cooper, Suhail Barot and staff members Mike Doyle and Betty Earle. The Committee met several times through the summer and established three subcommittees that met to explore individual principles.

As part of its deliberations, the Committee reviewed the history of the program including Fred Bailey's will, the initial Bailey Guidelines from 1957 and the revised guidelines from 1964. At the Committee's request, staff met with both representatives of the University's Financial Office as well as the Graduate College's Office for Fellowships so the Committee could include their feedback and perspective. Finally, the Committee discussed similar programs such as the Bonner Scholar Program, Illinois Program for Research into the Humanities to identify ideas and concepts that could be incorporated into the Bailey Scholarship program. This report is the product of this process.

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## **I. History of Bailey Scholarship Program**

The Bailey Scholarship program was created by Fred S. Bailey to provide financial support to U of I students who demonstrated unique skills and talents that would allow them to flourish as community leaders who could make a difference in their community. Over the past fifty years, the University YMCA has awarded millions of dollars in scholarships to thousands of University of Illinois students through the Bailey Scholarship Program. Since 2001, over 500 students have received \$1.1 million in Bailey Scholarships.

As President of Champaign National Bank, Fred S. Bailey developed a strong appreciation for the University YMCA and believed in its commitment to develop and nurture ethical leaders who were committed to making the world a better place. When he passed away in 1955, his Will established the Fred Bailey Trust and designated two-thirds of the income to be paid to the University YMCA for scholarships to U of I students on the basis of "moral character, intelligence, leadership and scholarship without regard to their field of study."

On February 22, 1956, the Ad Hoc Committee on the Bailey Scholarship Program, led by several influential university community leaders, including future UIUC Chancellor John Cribbet and Robben Flemming future University of Michigan President, developed the first set of Bailey Scholarship guidelines for consideration by the University YMCA Board of Directors. On June 25, 1956 the Board of Directors approved those guidelines. Under those guidelines a Bailey Committee of the Board of Directors was established to oversee the scholarship program and on November 28, 1956 the first check for \$24,455 was received from Fred Bailey Trust.

On September 25, 1957, the University YMCA announced that sixty-nine University of Illinois students were awarded Bailey Scholarships for that school year. The awards ranged from \$200-500 for undergraduates and \$500-1,200 for graduate students. Awardees included 10 graduate students, 14 seniors, 17 juniors, 11 sophomores and 17 freshmen and represented 40 Illinois towns, 4 states and 7 foreign countries.

On December 18, 1963 the Bailey Committee made some minor administrative changes to the Bailey Scholarship Guidelines, which were approved, in early 1964. Other than these minor changes, the Bailey Guidelines have been in place since 1957 until the present time. However, by 2009 there was increasing concern expressed by the University YMCA Board of Governors that the Bailey Scholarship program had become isolated from other University YMCA programs.

At its April 4, 2009 meeting, the University YMCA Board of Governors discussed both the desire and need to review, update and better integrate the Bailey Scholarship Program within the University YMCA. At the conclusion of the discussion, the Board voted to establish an Ad Hoc Committee that would meet during the summer months and report back to the Board of Governors in the fall of 2009. In its charge to the Committee, the Board directed the Committee to use the following principles to guide its review and recommendations:

- *To more fully integrate Bailey Scholarship program into University YMCA infrastructure and programming*
- *To encourage/develop a more mission driven emphasis within Bailey Scholarship Program*
- *To redefine public perception and awareness of Bailey Scholarship Program*

## II. Program Integration

In recent years, there has been a growing concern among the Board of Governors that although the Bailey Scholarship program was a valuable program of the University YMCA, it had become increasingly isolated within the organization. As a result, there were certain inefficiencies as well as duplication of effort from administrative to development activities. In addition, many felt there were missed opportunities for collaboration and integration of the Bailey Scholarship program into the mission of the University YMCA. In response, the Board of Governors specifically directed the Ad Hoc Bailey Committee to explore how these issues could be resolved and adopted the following principle to help guide the Committee review of the Bailey Scholarship Program:

*Principle #1: To more fully integrate Bailey Scholarship Program into University YMCA infrastructure and programming*

As the Committee discussed how best to integrate a revamped Bailey Scholarship Program into the University YMCA infrastructure and programming it identified three specific areas and developed recommendations for each area:

- A) **DEVELOPMENT:** Historically, the Bailey Director has been responsible for raising funds to support for the Bailey Scholarship program. These efforts have not been coordinated with and sometimes duplicated University YMCA development efforts. Consolidating these development activities will help strengthen fundraising for both Bailey and the University YMCA.

***Recommendations:***

- Reassign donor development and fundraising activities for the Bailey Scholarship Program to University Y Development Office.
- BOG Development Committee, with input from the Bailey Committee, should oversee the implementation of a strategic approach in building support from Bailey Alumni.
- Incorporate Bailey Donors into E-Tapestry data base

- B) **BUDGET/FINANCE:** The Bailey Scholarship program currently operates on a July 1<sup>st</sup> to June 30<sup>th</sup> fiscal year, while the University YMCA uses a January 1<sup>st</sup> – December 31<sup>st</sup> fiscal year. These overlapping timeframes creates unnecessary confusion and complicates reporting and budgeting processes. In recent years, the Bailey Director had responsibility for investing Bailey surplus funds and alumni donations as well as check writing responsibilities.

***Recommendations:***

- Continue to maintain all Bailey accounts separate from University Y accounts as required by general accounting principles but reassign daily financial management responsibilities to the Director of Operations.
- Include Bailey funds in the University YMCA's normal budgeting and financial reporting processes.
- BOG should explore formation of an "Investment Committee" that might meet annually to review Bailey and other investments not part of endowment.
- Direct staff to revise current budget for Bailey to 6-month period ending 12/31/09.

- Adopt a 17.5% administrative fee of gross revenues for managing the Bailey Scholarship Program that would begin in 2010 and would be periodically reviewed.
- Allocate an additional \$15,000 in next twelve months for transition costs such as staff time, web site design, printing costs.

**C) PROGRAM:** In recent years, the role of Bailey Committee members has been largely to serve as Readers, responsible for reviewing and rating applications. Because of the time commitments requested of readers, very few of the Committee members are on the Board of Governors, which reduces the accountability, oversight and policy input. Additionally, there has been very little, if any, collaboration between the Bailey Scholarship Program and other University YMCA programming. As a result, we have missed opportunities to engage and support Bailey Scholars with their involvement and participation.

***Recommendations:***

- Bailey Committee should be a standing Committee of the Board of Governors responsible for Oversight, Programming and Policy decisions. Committee members should not necessarily be Bailey Readers although committee members could choose to be a Reader.
- The Bailey Committee or a subcommittee would make final decision on awardees using the feedback from Readers, information provided by the applicants and other methods they may determine helpful (i.e. interviews).
- Redesign the application process with less emphasis on financial need and more attention to who the students are and what they have done to demonstrate their commitment and potential (see III. A Mission Driven Program).
- Bailey Coordinator should be part of University YMCA program staff and should explore opportunities to engage and support Bailey Scholars as part of the University Y programs.

### **III. A Mission Driven Program**

As noted in the previous section, the Bailey Scholarship Program has become largely a financial aid program over the past twenty years. Although the Board of Governors believes this is valuable and important, there was consensus among BOG members that this narrow focus of Bailey Scholarships does not adequately fulfill Fred Bailey's desire to encourage and nurture students to become moral and ethical leaders. In fact, in the initial 1957 Bailey Guidelines provides a historical context for this perspective:

*“The Bailey Scholarships shall have a special significance and shall not become just another scholarship program. It is evident that Mr. Fred S. Bailey, in leaving the funds to the YMCA instead of the University of Illinois, expected that special consideration be given to the disbursement of the scholarships. The Board of Directors of the YMCA interprets this gift as evidencing a special confidence in the YMCA and accepts the trust accordingly.”*

Considering this, the Board of Governors adopted the following principle to guide the Ad Hoc Committee in its review of the Bailey Scholarship Program:

*Principle #2: Develop and encourage a more mission driven emphasis within Bailey Scholarship program.*

In its deliberations, the Ad Hoc Committee explored six different elements of the Scholarship Program and developed recommendations for each of these categories.

Qualifying Characteristics. Considering this, and the important role the University YMCA has in fulfilling Mr. Bailey' confidence in the University YMCA to select who should receive a Bailey Scholarship, the Committee spent considerable time discussing how we should update what we are looking for in Bailey Scholarship candidates. The following language best describes what we believe are the “characteristics” that should be used in selecting Bailey Scholars:

***Recommendation:***

- A qualified candidate will have a strong combination of the following characteristics – a record of awareness, service, and dedication to social justice, ethical leadership, community involvement, promoting inclusiveness, community commitment, and spirituality.

Financial Need. As indicated earlier in this report, Committee members agreed that the program should be less of a financial aid program with more emphasis on the applicants themselves – who they are, what they have done and what they want to do. While the Ad Hoc Committee believed that financial need should be a factor in considering eligibility, there was clear agreement that the application should be streamlined to include less information about an applicant’s financial situation and more emphasis on a candidate’s demonstrated activities and abilities and thoughtfulness about critical values. The Committee did not favor using family size and income level as a simple formula for determining financial need. There was also consensus that applicants should be allowed to explain any special financial circumstances they feel should be considered with their application.

***Recommendations:***

- Financial need should be one factor among many in considering and weighing applications. Students applying for a Bailey Scholarship should be required to provide a copy of their parents/student most recent IRS 1040. The application should include a question related to financial need.

Timetable. The Committee supported moving away from a “rolling” application process that has been used the past few years in favor of firm deadlines for submitting applications. There was a long discussion about whether or not we should establish a separate timeframe and application process for incoming freshman. However, in response to staff concerns that this would create too much of an administrative burden the Committee agreed that there should be one timetable for all applicants. The Committee contacted the UIUC Financial Aid office before determining the dates it is recommending.

***Recommendation:***

- The following deadlines should be used each year:
  - a. Applications must be submitted in full by March 15th of each year
  - b. Awards will be announced by June 15th
  - c. There will be no awards for the summer semester

Academic Achievement and Scholarship. Fred Bailey’s Will specified students awarded scholarships should be selected on the basis of “moral character, intelligence, leadership and scholarship.” Although

the Committee felt a transcript should be requested as part of the application process, the Committee did not support a specific GPA cutoff for applicants.

***Recommendation:***

- An applicant's academic transcript should be requested as part of the application, but no specific GPA cut-off level should be used to determine eligibility.

Applications. Although the Committee did not view the task of redesigning the application as part of its mandate, the Committee did discuss what type of information might be useful. The following are Committee recommendations concerning the redesign of the application process:

***Recommendations:***

- Applicants could be given the choice of answering 2 essays questions from a list of questions included in the application.
- Only two references should be requested and accepted.
- The application should provide an opportunity to list other awards and recognition they have received to demonstrate their commitment to certain values.
- Applicants should be given an opportunity to list community activities and involvement
- As noted above applicants should be given the opportunity to provide supporting information to demonstrate their intelligence and scholarship per Fred Bailey's will.
- When reviewing and rating applications, a variety of factors should be considered including: a record of leadership, scholarship and intelligence, evidence of thoughtful consideration of issues, involvement in their community, a commitment to giving back to their community, a history of community service and volunteering.

Size, Type and Frequency of Awards. One of the longest discussions revolved around the levels and types of awards that would be used in making Bailey Scholarships. During this discussion Committee members were fluid and sometimes changed their preferences as new issues and concerns were raised. One of the biggest discussions centered on how often a student could receive a Bailey Scholarship. Increasing the size of awards significantly reduces the number of awards provided – on average 6-7 recipients in each class. With candidates likely to reapply each year there might only be a handful of new recipients each year. Since many students do not 'blossom' or 'emerge' until later in their college career, there was concern that it would be difficult to qualify if you did not receive an award in your freshman year. In light of this, the Committee discussed the possibility of making Bailey Scholarships a one-time award. In the end, the Committee decided that a student should be eligible for only one scholarship in their freshman, sophomore and junior years.

***Recommendations:***

- *Eligibility.* The Committee strongly supports increasing our outreach effort to encourage incoming freshman to apply but does not support setting aside a specific number of scholarships for any particular class other than seniors.
- *Size of Awards.* In order to simplify the decision making process there was broad support for setting three different levels of awards:
  - \$3,000 for all awards for freshman, sophomores and juniors
  - \$5,000 for all awards for seniors (over 90 credit hours)
  - \$5,000-7,500 for post-baccalaureate students (possibly tied to UIUC criteria for fellowships)

- *Senior Awards.* There was widespread support for establishing four \$5,000 scholarships for seniors - one in each of the following categories – Social Justice, Environment, Faith Based, and International. These awards should be based in large part on the student's contribution in one of these areas during their initial three years on campus.
- *Graduate and Professional Student Awards.* A new category of awards should be established for post-baccalaureate students. Through its research the Committee learned that, if structured properly, the University would award a tuition and fee waiver to students receiving a Bailey fellowship. However, the Committee was divided whether we should offer one or two fellowships with tuition and fee waiver or three smaller awards at \$5,000 that are similar to the undergraduate awards with no tuition fee waiver.
- *Frequency of Awards.* The Committee recommends a student only be eligible for a Bailey Scholarship just once in their first three years (freshman, sophomore and junior). The Special Awards for seniors and post-baccalaureate students should be open to previous winners as well as new applicants.

#### **IV. A New Identity**

One of the common concerns expressed by both student and non-student members of the Board of Governors were how little awareness there was of the Bailey Scholarship Program. Considering that over 500 students were awarded scholarships that totaled more than \$1.1 million since 2001, there was tremendous desire to increase the publicity and prestige of the Bailey Scholarship program both in the campus community and across the state of Illinois. In order to correct this problem, the Board of Governors adopted this third and final principle for revamping the Bailey Scholarship Program:

*Principle #3: Redefine public perception and awareness of Bailey Scholarship Program*

In its deliberations, the Ad Hoc Committee identified three objectives that would help advance this principle - expanding the pool of candidates who apply for a Bailey Scholarship, broadening the awareness both on campus and in communities across Illinois about the Bailey Scholarship Program and increasing the prestige and recognition that accompanies being named as a Bailey Scholar. The Ad Hoc Committee developed the following recommendations for achieving these objectives:

***Recommendations:***

- Produce a new set of publicity materials including a new brochure, possible a poster and an updated website with the capability of applying and processing applications on line.
- Identify and compile a list of organizations and contacts on campus that we would reach out to, educate about the program and promote application deadlines including RWA, A & A Deans List, Living Learning programs, student organizations, etc.
- Develop relationships with programs and organizations across Illinois to help promote the existence of Bailey scholarships including Service groups, High School Counselor associations, the YMCA's Youth in government program, Teachers for Social Justice etc.

- Expand how we promote the awarding of Bailey Scholarships by a) sending out news releases to C-U media as well as local media and high schools of the awardees, b) featuring Bailey Scholars in our publications, and c) invite Bailey scholars to Annual Auction and Dinner.
- Increase the prestige of being a Bailey Scholar by organizing an awards ceremony with guest speakers and a focus on the awardees and featuring the work they have done.

## V. Proposed Bailey Scholarship Regulations

Based on the recommendation contained in this report, the Ad Hoc Committee is proposing that the 1964 Regulations for the Operation of the FRED S. BAILEY SCHOLARSHIP FUND be revised accordingly:

Bailey Scholarships are designed to provide financial assistance to University of Illinois students with "moral character, intelligence, leadership and scholarship" according to Fred Bailey's will. Bailey Scholarships will be awarded to students who have demonstrated some or all of the following characteristics – a record of awareness and community service as well as a dedication to social justice, ethical leadership, community involvement, promoting inclusiveness, and spirituality.

### Structure of Program

- I. Bailey Committee. The Board of Governors of the YMCA shall establish as one of its standing committees the Fred S. Bailey Scholarship Committee and delegate to it the responsibility for overseeing the operation of the Bailey Scholarship Fund and the awarding of scholarship grants.
- II. Annual report. The Bailey Scholarship committee shall submit annually to the Board of Governors a report of all awards, which have been made during the year.
- III. Bailey Readers. Although the Bailey Committee shall make the final decision for awarding Bailey Scholarships, each application shall be reviewed by at least two individuals who are selected by the Committee to serve as Bailey Readers. These individuals shall be recruited to serve as Bailey Readers based on their experience and involvement in community activities, familiarity with college students and shared values promoted by the Bailey Scholarship Program. Bailey Readers shall be required to attend an orientation and provided training about what we are looking for in applicants and how to evaluate applications.

### Fiscal Management

- IV. Separation of Funds. The funds received by the YMCA from the Bailey Trust shall be kept in a separate bank account, known as the Fred S. Bailey Scholarship Fund of the Young Men's Christian Association of the University of Illinois.
- V. Surplus Funds. Any unexpended money in the Bailey Scholarship Fund at the end of the fiscal year shall be available for use in the succeeding year.

- VI. Administrative Costs. The University YMCA shall be reimbursed for the costs of managing the Bailey Scholarship program 17.5% of the gross annual revenue. These funds are to be used to support administrative and development activities as well as all program work associated with the Bailey Scholarship Program.
- VII. Annual Financial Reports. The University YMCA Budget Committee should provide an annual report of income and expenses for the Bailey Scholarship Program to the Board of Governors.

### **Eligibility for Scholarships**

- VIII. Criteria. Bailey Scholarships shall be awarded to students that "have demonstrated some or all of the following characteristics – a record of awareness and community service as well as a dedication to social justice, ethical leadership, community involvement, promoting inclusiveness, and spirituality."
- IX. Non-discrimination. Evaluation of the applicants to the Bailey Scholarship Program shall adhere to the University YMCA Nondiscrimination Statement.
- X. Academic Standing. Scholarships are awarded without regard to an applicant's field of study. An applicant must provide an academic transcript as part of the application, but no specific GPA cut-off level is used to determine eligibility.
- XI. Financial Need. Financial need should be one factor among many in considering and weighing applications. Students applying for a Bailey Scholarship should be required to provide a copy of their parents/student most recent IRS 1040. The application should include a question related to financial need.
- XII. Full-Time Status. Recipients of Bailey Scholarship awards shall be full-time students in University of Illinois programs located on the Urbana-Champaign campus.

### **Size, Frequency and Types of Awards**

- XIII. Categories and Size of Awards. There are three categories of Bailey Scholarship Awards: \$3,000 awards to students in their freshman, sophomore and juniors years; a \$5,000 for seniors (more than 90 credit hours); and \$5,000-\$7500 for post-baccalaureate students.
- XIV. Frequency of Awards. No student may qualify for more than one award during his or her freshman, sophomore or junior years at the University. Awards for seniors and post-baccalaureate students are open to previous Bailey recipients as well as new applicants. There is no specific number of scholarships for any particular class other than seniors.
- XV. Senior Awards. Each year the Committee shall award four scholarships for seniors recognizing their work in one of each of the following categories – Social Justice, Environment, Faith Based, and International. These awards are to be based in large part on the student's contribution in one of these areas during their initial three years on campus.
- XVI. Post-Baccalaureate Awards or Bailey Fellowships. Each year, the Committee shall give a Bailey Scholarship Award or Fellowship to post-baccalaureate students. This award may be given in conjunction with the Graduate College to enable the awardees to receive a "tuition and fee waiver" as part of their award.

APPENDIX  
Summary of Recommendations

**Principle #1: To more fully integrate Bailey Scholarship Program into University YMCA infrastructure and programming**

- Reassign donor development and fundraising activities for the Bailey Scholarship Program to University Y Development Office.
- BOG Development Committee, with input from the Bailey Committee, should oversee the implementation of a strategic approach in building support from Bailey Alumni.
- Incorporate Bailey Donors into E-Tapestry data base
- Continue to maintain all Bailey accounts separate from University Y accounts as required by general accounting principles but reassign daily financial management responsibilities to the Director of Operations.
- Include Bailey funds in the University YMCA's normal budgeting and financial reporting processes.
- BOG should explore formation of an "Investment Committee" that might meet annually to review Bailey and other investments not part of endowment.
- Direct staff to revise current budget for Bailey to 6-month period ending 12/31/09.
- Adopt a 17.5% administrative fee of gross receipts for managing the Bailey Scholarship Program that would begin in 2010 and would be periodically reviewed.
- Allocate an additional \$15,000 in next twelve months for transition costs such as staff time, web site design, printing costs.
- Bailey Committee should be a standing Committee of the Board of Governors responsible for Oversight, Programming and Policy decisions. Committee members should not necessarily be Bailey Readers although committee members could choose to be a Reader.
- The Bailey Committee or a subcommittee would make final decision on awardees using the feedback from Readers, information provided by the applicants and other methods they may determine helpful (i.e. interviews).
- Redesign the application process to emphasize and criteria for selecting Bailey Scholars with less emphasis on financial need and more attention to who the students are and what they have done to demonstrate their commitment and potential (see II. A Mission Driven Program).
- Bailey Coordinator should be part of University YMCA program staff and should explore opportunities to engage and support Bailey Scholars as part of the University Y programs.

**Principle #2: Develop and encourage a more mission driven emphasis within Bailey Scholarship program.**

- A qualified candidate will have a strong combination of the following characteristics – a record of awareness, service, and dedication to social justice, ethical leadership, community involvement, promoting inclusiveness, community commitment, and spirituality.
- Financial need should be one factor among many in considering and weighing applications. Students applying for a Bailey Scholarship should be required to provide

- a copy of their parents/student most recent IRS 1040. The application should include a question related to financial need.
- The following deadlines should be used each year:
    - Applications must be submitted in full by March 15th of each year
    - Awards will be announced by June 15th
    - There will be no awards for the summer semester
  - An applicant's academic transcript should be requested as part of the application, but no specific GPA cut-off level should be used to determine eligibility.
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  - *Eligibility.* The Committee strongly supports increasing our outreach effort to encourage incoming freshman to apply but does not support setting aside a specific number of scholarships for any particular class.
  - *Size of Awards.* In order to simplify the decision making process there was broad support for setting three different levels of awards:
    - \$3,000 for all awards for freshman, sophomores and juniors;
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  - *Graduate and Professional Student Awards.* A new category of awards should be established for post-baccalaureate students. Through its research the Committee learned that, if structured properly, the University would award a tuition and fee waiver to students receiving a Bailey fellowship. However, the Committee was divided whether we should offer one or two fellowships at \$7,500 with tuition and fee waiver or three smaller awards at \$5,000 that are similar to the undergraduate awards with no tuition fee waiver.
  - *Frequency of Awards.* The Committee recommends a student only be eligible for a Bailey Scholarship just once in their first three years (freshman, sophomore and junior). The Special Awards for seniors and post-baccalaureate students awards would be open to previous winners as well as new applicants.

***Principle #3: Redefine public perception and awareness of Bailey Scholarship Program***

- Produce a new set of publicity materials including a new brochure, possible a poster and an updated website with the capability of applying and processing applications on line.
- Identify and compile a list of organizations and contacts on campus that we would reach out to, educate about the program and promote application deadlines including RWA, A & A Dean offices, Living Learning programs, student organizations, etc.
- Develop relationships with programs and organizations across Illinois to help promote the existence of Bailey scholarships including Service groups, High School Counselor associations, the YMCA's Youth in government program, Teachers for Social Justice, etc.
- Expand how we promote the awarding of Bailey Scholarships by a) sending out news releases to C-U media as well as local media and high schools of the awardees, b) featuring Bailey Scholars in our publications, and c) invite Bailey scholars to Annual Auction and Dinner.
- Increase the prestige of being a Bailey Scholar by organizing an awards ceremony that with guest speakers and a focus on the awardees and featuring the work they have done.