



Western Oregon
UNIVERSITY

YEAR ONE REPORT

MISSION AND CORE THEMES

Submitted to Northwest Commission on Colleges and Universities

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RESPONSE TO SPRING 2016, YEAR SEVEN RECOMMENDATIONS, AS REQUESTED BY THE COMMISSION

Of the three recommendations scheduled to be addressed in this Year One Report, Recommendation 1 was an area that was substantially in compliance but in need of improvement, and Recommendations 2 and 3 were cited as areas of concern. Since receiving the Commission's letter of July 14, 2016, WOU's leadership has taken substantive action to ensure that WOU fully meets the Commission's criteria for accreditation. Those actions are detailed in this document in order to demonstrate that the institution has fully and appropriately addressed the three recommendations.

Elements of WOU's responses to Recommendations 1, 2, and 3 within this section will reappear later under the Standard 1.A and 1.B sections of the Year One Report because the recommendations closely parallel the requirements for the Year One Report.

Recommendation 1: The evaluation committee recommends that the institution clarify its mission statement to provide better direction for mission fulfillment (Standard 1.A.1).

Response

In WOU's Year Seven Report (March 2016), the previous mission statement contained three broad focus areas that shared equal value. Consequently, campus constituents struggled to articulate meaningful, assessable, and verifiable measures of mission fulfillment. In some cases, performance indicators were selected based on measurability rather than meaningfulness.

During the past nine months, President Rex Fuller addressed this challenge through the institutional strategic planning process. The new strategic plan, [*Forward Together: 2017-2023*](#)¹ (Appendix A), articulates a more specific mission, along with a statement of vision, values, purpose, and institutional priorities for the university. The strategic plan and new mission were unanimously [**approved**](#)² January 25, 2017, by the WOU Board of Trustees (Appendix B) and is awaiting final approval by the Higher Education Coordinating Commission at its April 2017 meeting. The new mission states:

Western Oregon University creates lasting opportunities for student success through transformative education and personalized support.

This mission prioritizes WOU's purpose to create *lasting opportunities for student success*. It highlights *lasting opportunities* because academic achievement is a gateway to lifelong learning as well as to future opportunities for WOU's graduates, their families, and the communities WOU serves throughout Oregon. Students who undertake degree programs do so to achieve an end state: a degree, certificate, or teaching endorsement. Since Oregon's governor and legislators prioritize degree completion as the most critical component of the Higher Education Coordinating Commission's (HECC) annual evaluation

¹ The final strategic plan available at:

http://www.wou.edu/planning/files/2016/05/Forward_Together_2017_23.pdf

² Summary of minutes available at: <http://www.wou.edu/board/meeting-materials/>

of public universities and the basis for public funding under its current [funding model](#)³ (Appendix C), WOU also has defined degree completion as a critical feature of *student success*.

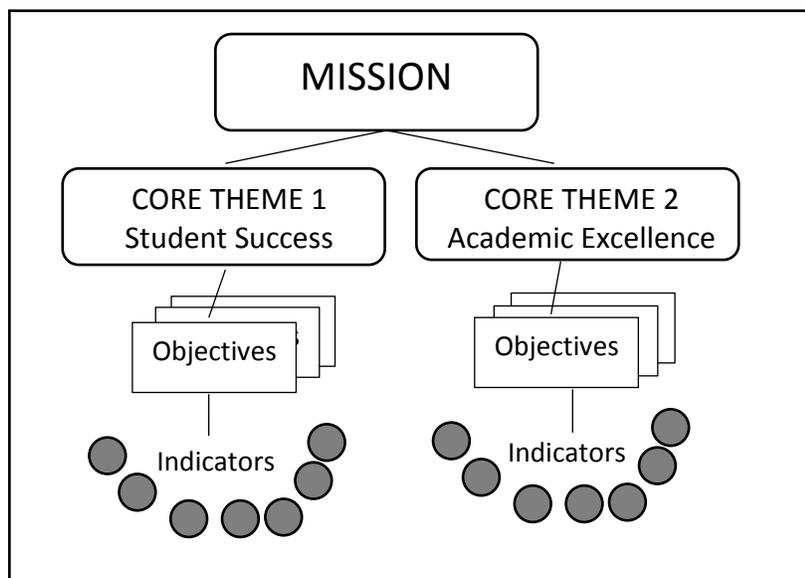
Student success is achieved through transformative education and personalized support. *Transformative education* requires the creation of a campus environment which results in enhanced learning. Academic excellence is expressed through curricular and co-curricular programs whose design both develops in students the knowledge and skills expected in their respective degree programs and also is transparent, intentional, directional, and cohesive.

Personalized support is provided across a campus-wide environment that includes significant faculty and staff interactions with students, proactive student services, and efforts to accommodate student needs. For example, advising appointments are required each term for each student; undeclared majors are served by professional advisors in the Academic Advising and Learning Center and students with declared majors are assigned faculty advisors from that academic program.

In addition to the mission statement, the new strategic plan articulated five institutional priorities: 1) Student Success, 2) Academic Excellence, 3) Community Engagement, 4) Accountability, and 5) Sustainability and Stewardship. The latter three are defined as broad *operational imperatives* that help define goals for how WOU and its members will conduct the institution’s affairs. The first two institutional priorities, however, were designated by leadership as “core themes” for NWCCU accreditation because they are derived directly from the mission statement.

The relationship of the elements that pertain to evaluating mission fulfillment – mission statement, core themes, objectives, and indicators – is shown below in Figure 1.

Figure 1: Relationship of Elements



³ Student Success and Completion Model overview available at: <https://www.oregon.gov/highered/Documents/HECC/Resources/Finance/FINALOregonSSCMTwo-Page2102016.pdf>

Objectives are assessable outcomes that articulate desired states for mission fulfillment. Indicators have pre-defined targets against which WOU will evaluate its accomplishment of those objectives. Indicators may be qualitative or quantitative measures and may be direct or indirect. For example, evaluating progress on student success includes a direct measure: the six-year graduation rate. However, indirect measures might include total student credits at the time of graduation, or NSSE survey results of student perceptions. Both of these would serve to evaluate progress toward reducing barriers to graduation, which contributes to increasing the graduation rate. Essentially, indirect measures assess the actions that are expected to contribute to improved results for direct measures.

The newly adopted mission statement provides a much stronger focus for WOU's efforts and better direction for measuring mission fulfillment. The designated core themes are derived directly from the mission and are specifically designated as the top two institutional priorities in the new strategic plan. Because of this, WOU has achieved a much-needed alignment between mission and core themes, as well as between assessments of progress on WOU's strategic plan, and similar assessments related to NWCCU accreditation requirements. WOU's strategic plan and accreditation mission and core themes also are well-aligned with factors within HECC's university evaluation framework as well as the Student Success Completion Model (Appendix C), which determines WOU's funding levels from the state.

In summary, WOU has responded to the Commission's Recommendation 1 by (1) developing a mission statement that arises from, and is understood by, the WOU community through a year-long strategic planning process, (2) ensuring a clarified mission focus that improves WOU's ability to articulate desired outcomes and define acceptable progress toward mission fulfillment, (3) establishing two core themes, Student Success and Academic Excellence, that serve as institutional priorities, and (4) demonstrating multiple points of alignment across the institution's strategic planning, accreditation planning and Oregon's higher education priorities. As noted above, the WOU Board of Trustees approved the new mission and strategic plan at its January 2017 meeting. **With these actions, WOU has clarified its mission to provide better direction for mission fulfillment and has met the Commission's expectations as expressed in Recommendation 1.**

Recommendation 2: The evaluation committee recommends that the institution define mission fulfillment including identifying outcomes that represent the extent of the institution’s accomplishment of mission fulfillment (Standard 1.A.2 and Eligibility Requirements 22 & 23).

Response

In accordance with Standard 1.A.2, WOU leadership defines mission fulfillment as achievement of WOU’s outcomes (referred to as ‘objectives’) under the two core themes, as seen in Table 1, below. Progress on fulfillment of these objectives is assessed using measurable and verifiable indicators that are noted within the Year One Report, later in this document. In addition, a detailed explanation of the assessment process is included under WOU’s Response to Recommendation 3.

Table 1: Core Themes and Objectives

<p>CORE THEME 1 STUDENT SUCCESS</p> <p>Student success – specifically degree completion – is made possible through an accessible curriculum, attainable programs, supportive structures, and personalized services.</p>	<p>OBJECTIVES:</p> <ol style="list-style-type: none"> 1. WOU curriculum is offered across multiple delivery pathways. 2. WOU programs can be completed in a timely, efficient manner. 3. WOU student services facilitate student persistence and success. 4. Students perceive positive, personalized interactions with WOU faculty and staff. 5. WOU strives to limit financial hardship that interferes with student persistence.
<p>CORE THEME 2 ACADEMIC EXCELLENCE</p> <p>WOU provides an academic environment of well-defined curricular and co-curricular opportunities that enable students to engage in purposeful learning experiences.</p>	<p>OBJECTIVES:</p> <ol style="list-style-type: none"> 1. WOU demonstrates alignment across course, program and university learning outcomes. 2. Academic and co-curricular programs are responsive to the evolving needs of students. 3. WOU champions outstanding teaching as well as scholarship, research and creativity to promote student learning. 4. Students participate in high-impact learning practices.

This next section provides an overview of WOU’s responses to the requirements articulated within Eligibility Requirements 22 and 23.

Eligibility Requirement 22 conveys an expectation that the institution publishes learning outcomes for each degree and certificate program. All learning outcomes for academic programs, including certificates, were reviewed, and revised or reaffirmed in fall 2016. Current program learning outcomes are expected to be published in the 2017-2018 Course Catalog in summer 2017. Additionally, Associate Provost Monahan is working with faculty to create an electronic repository for course and program learning outcomes that will be integrated with the Faculty Senate Curriculum Committee’s portal for

submitting new or revised course and program proposals. This is expected to be completed by, and discussed within, WOU's Ad Hoc Report, due fall 2017.

Not only has the institution made progress on ensuring learning outcomes for programs, but work is also in progress to demonstrate and document alignment across course, degree program, and university learning outcomes. The deadline for all information to be submitted via the Academic Effectiveness website is April 30, 2017; this process and results will also be covered in detail in the Ad Hoc Report, due fall 2017.

Eligibility Requirement 23 conveys actions that, in essence, define a reiterative cycle that allows the institution to remain effective, sustainable, and viable. The actions include:

1. Systemically applying a clearly defined evaluation and planning process
2. Assessing achievement toward core themes and mission
3. Communicating results of that assessment to university constituents
4. Using those results to effect institutional improvement

WOU has now defined its process, including assessing achievement, communicating results, and using the results to effect institutional improvement. First, WOU will systematically review achievement data for each metric against that indicator's target goals. Most data is on an annual cycle; data is either internal data or relies on national, standardized surveys (e.g., NSSE) or reports (e.g., IPEDS). Assessment reviews will be managed by the appropriate authority, such as a designee of the president, Academic Affairs offices under the provost (Appendix D) or the director of institutional research. Preliminary reports on achievement will be reviewed to assess obstacles and opportunities for institutional improvement; the provost will assign responsibility for developing action plans. The provost will regularly update the President's Cabinet (senior officers seen on the university's organizational chart, Appendix E) and the new University Council⁴ to ensure integration with other institutional planning efforts. The provost's directors and staff, working with the director of institutional research, will annually compile a full report of accreditation assessment results. Whenever WOU has not met expectations for target goals, an action plan for improvement will be included with the results report.

Assessing *overall* institutional achievement is accomplished through the new University Council, which will annually determine overall institutional progress toward mission fulfillment. (The University Council holds responsibility to review WOU's results for specific indicators as well as overall achievement.) Given the recent approval of the mission statement, the Council's first task is to identify an appropriate framework or scorecard by which to weight individual indicator results based on value to the institution, complexity of efforts, or other variables. The framework developed by the Council is intended to allow for an overall holistic assessment in a verifiable manner. After concluding its annual review, the Council will articulate the outcome of its assessment through a formal recommendation to WOU's president, and the president will subsequently report WOU's progress to the Board of Trustees.

Communicating results and making the data available for institutional improvement efforts will occur through both direct and indirect means. For example, because the University Council reviews progress

⁴ Members on the council are expected to represent student, faculty and staff governance groups, cabinet offices, and directors and deans of key units.

on accreditation assessment as well as progress toward priority goals under the strategic plan, there is an expectation that communication will flow across parties involved in both efforts. Communication to members of other key committees, such as the now-forming [University Budget Committee](#) (Appendix F) or other campus and community constituents will follow after the report to the Board of Trustees. The President's Cabinet (which includes all senior vice-presidents) is briefed before the meeting with the Board of Trustees, so the Cabinet will also receive an annual briefing on accreditation assessment progress. Finally, plans for a data repository and online information-sharing site will be finalized with input from the director of Institutional Research when that position is filled.

Overall, **WOU has met the commission's expectations as expressed in Recommendation 2**, (Eligibility Requirements 22 and 23 and Standard 1.A.2) by identifying objectives that represent mission fulfillment; defining a process by which those objectives will be evaluated against meaningful, assessable, and verifiable indicators; identifying roles and responsibilities; and ensuring outcomes will be communicated regularly to campus constituencies.

Recommendation 3: The evaluation committee recommends that the institution establish objectives for each core theme and identify meaningful, assessable, and verifiable direct and indirect indicators of achievement that form the basis for evaluating accomplishment of the objectives of the core themes (Eligibility Requirements 23; Standard 1.B.2)

Response

In accordance with Eligibility Requirement 23 and Standard 1.B.2, WOU developed an evaluation framework by which the institution assesses the results of its efforts. Details of its components are below.

First, WOU established meaningful, assessable, and verifiable indicators of achievement.

Table 2 displays a sample indicator with its two levels of target goals. The Level 1 Goal is the minimally acceptable level of performance; the Level 2 Goal is a higher target level for performance. (The full set of objectives and indicators is included under Standard 1.B of the Year One Report.)

Indicators and goals are defined specifically to ensure they are assessable and verifiable. (The data to be used to evaluate performance is documented in the provost’s operations files.) Data types are internal institutional data or standardized data from national sources (e.g. IPEDS, NSSE, College Results Online), which provide comparison results for WOU and a WOU-defined national peer group.

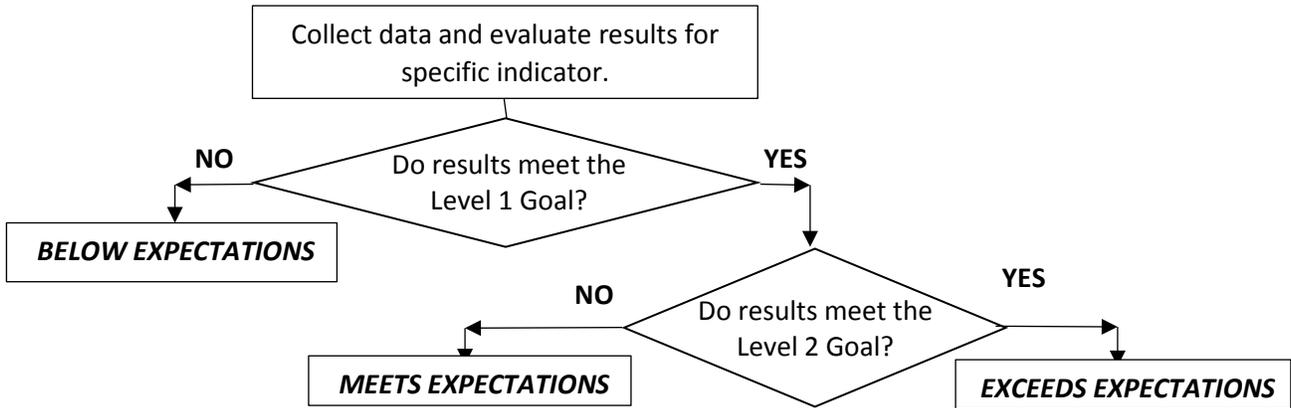
Table 2: Example of Level 1 and Level 2 Goals for One Indicator

Core Theme 1	Indicator	Level 1 Goal	Level 2 Goal
OBJECTIVE: Programs can be completed in a timely and efficient manner	Undergraduate six-year graduation rate (based on full-time, first-time cohort)	WOU’s six-year graduation rate for the year under review must be equal to or above the prior five-year moving average for WOU’s six-year graduation rate.	WOU’s six-year graduation rate for the year under review must be equal to or above the median value of the national comparator group’s five-year moving average of six-year graduation rate.
		<i>For example:</i> If WOU’s six-year graduation rate for spring 2017 is 41%, then prior five-year moving average must be equal to or less than 41% in order to for WOU to meet Level 1.	<i>For example:</i> If WOU’s six-year graduation rate for spring 2017 is 41%, then the median value of the comparator group’s five-year average must be equal to or less than 41% in order for WOU to meet Level 2.

Second, WOU has defined how to evaluate performance based on indicator results.

WOU has defined how achievement data will be translated into three categories: below expectations, meets expectations, and exceeds expectations. Figure 2 illustrates the decision process.

Figure 2: Decision Process



If the institution meets the Level 1 Goal, that indicator will receive a rating of “meets expectations” for progress toward mission fulfillment. However, if the institution fails to meet the Level 1 Goal, then that indicator will receive a rating of “below expectations.” All indicators that are below expectations will subsequently require a review of institutional plans and efforts leading to a written action plan for remediation. This action plan will be included in the report to the University Council. If the institution meets the Level 2 Goal, the indicator will receive a rating of “exceeds expectations.”

Third, WOU has determined how to summarize performance across all indicators.

Academic Affairs (with Institutional Research) will be compiling all ratings and noting achievement results into a preliminary summary matrix (Table 3). For example, if the data reflects achievement for indicator 1 “exceeds expectations,” that column would be highlighted in green. Thus, the summary matrix provides a visual overview of progress on mission fulfillment based on color coding in order to focus internal reviewers’ attention to the more critical problem areas.

This matrix (and supporting details, data or action plans) will be provided to the University Council for its annual review of mission fulfillment. The council will use these materials, as well as qualitative attributes such as value and difficulty of efforts undertaken, to review the preliminary matrix and make any adjustments deemed appropriate. Then, it will conduct a holistic assessment of institutional progress based on all indicators’ outcomes and make a recommendation of overall institutional progress on mission fulfillment to the president. This process enables a review of achievement of all indicators by the broadly representative members of the University Council who may have a range of experience in accreditation and institutional metrics.

Table 3: Summary Matrix

Objectives	Indicator	Below Expectations	Meets Expectations	Exceeds Expectations
Programs can be completed in a timely and efficient manner	Undergraduate six-year graduation rate (based on full-time, first-time cohort)	[RED]	[BLUE]	[GREEN]

Finally, WOU has preliminary plans for communicating and integrating results.

Communicating results to critical groups is vital for ongoing institutional improvement. The University Council is charged with monitoring progress on strategic plan initiatives, as well as reviewing and assessing overall institutional achievement toward mission fulfillment. Therefore, its review and subsequent overall evaluation that is recommended to the president will inform decision-making related to strategic plan initiatives. The annual State of the University address to campus members in September and the October Board of Trustee meetings provide opportunities for annual progress reports to constituents. Shared results are expected to inform the work of the Board and its committees, as well as campus units through the administrative structures.

In summary, WOU not only has identified outcomes (objectives) that represent “mission fulfillment,” but also has defined a framework for evaluating progress toward those objectives. This framework is based upon meaningful, assessable, and verifiable indicators, as well as explicitly defined target goals that allow for a consistent evaluation of efforts as “below expectations,” “meets expectations,” or “exceeds expectations.” The results will be compiled in a summary matrix that categorizes results by color, thus helping key decision-makers (e.g., the University Council) and allowing clearer communication of results to WOU’s campus community. **Therefore, WOU has met the commission’s requirements noted in Recommendation 3 relative to Eligibility Requirement 23 and Standard 1.B.2.**

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YEAR ONE REPORT

Institutional Overview

Western Oregon University, the oldest public higher-education institution in Oregon, is a comprehensive university serving students from Oregon, 30 states and territories, and more than 20 countries. WOU is classified as a master's college and university of medium size according to the Carnegie Classification of Institutions of Higher Education⁵.

The university is governed by a 15-member [Board of Trustees](#)⁶ (Appendix B), which includes President Dr. Rex Fuller as an ex officio, non-voting member. For an overview of all senior leadership, please see the university [organizational chart](#)⁷ (Appendix E).

The HECC has articulated key objectives for Oregon's public universities, and state appropriations funding is tied to performance levels⁸ on those objectives. The HECC's [2016 University Evaluation](#)⁹ for Western Oregon University summarizes those objectives as "student success as measured by degree completion; access and affordability as measured by equity across socioeconomic, racial/ethnic and regional (urban/rural) groups; academic quality and research; financial sustainability, and continued collaboration across universities in support of the State's mission for higher education" (HECC, pg. 3).

Programs and Degrees

WOU offers undergraduate and graduate [degree programs](#)¹⁰, graduate certificates and an associate degree limited to specific transfer degree completion programs in collaboration with international partners. At the undergraduate level, WOU offers Bachelor of Arts, Bachelor of Fine Arts, Bachelor of Music, Bachelor of Science, and Applied Baccalaureate degrees. There are 37 majors, with 30 concentrations within those majors. Most majors also have an associated minor option. Additionally, the education major has seven major areas for teaching or professional preparation and 21 subject specializations for teacher preparation at the elementary, middle, and high school levels.

Graduate degree [programs](#)¹¹ include the Master of Music in Contemporary Music, Master of Arts in Teaching, Master of Arts in Criminal Justice, Master of Arts in Interpreting Studies, Master of Science in Rehabilitation and Mental Health Counseling, Master of Science in Management and Information Systems, Master of Science in Deaf and Hard of Hearing Education and the Master of Science in Education. This last degree also allows students to specialize in information technology or special education.

⁵ The Carnegie Classification of Institutions of Higher Education (n.d.). Retrieved 2/6/2017 from <http://carnegieclassifications.iu.edu/>.

⁶ Board of Trustees: <http://www.wou.edu/board/>

⁷ Organizational chart: http://www.wou.edu/president/files/2016/09/WOU_Organizational_Chart-1.pdf

⁸ Overview: Student Success and Completion Model – See Appendix C

⁹ WOU 2016 University Evaluation (HECC):

<https://www.oregon.gov/highered/research/Documents/Reports/WOU-University-Evaluation-2016.pdf>

¹⁰ Degree programs: <http://www.wou.edu/resources/student-resources/academics/>

¹¹ Graduate degree programs: <http://www.wou.edu/graduate/>

Between July 1, 2015, and June 30, 2016, WOU awarded 930 undergraduate degrees and 200 master's degrees. The top five undergraduate degree programs were Business, Psychology, Criminal Justice, Exercise Science and Community Health Education. The top two graduate programs were the Master of Science in Education and the Master of Arts in Teaching.

Individual programs at WOU are accredited by the following organizations:

- National Council for Accreditation of Teacher Education – Last reviewed 2015.
- Council on Rehabilitation Education – Most recent site visit was February 2017.
- Commission on Collegiate Interpreter Education – Last reviewed 2010.
- National Association of Schools of Music – Next report due spring 2017.

The university also is in compliance with the Oregon Teacher Standards and Practices Commission, which authorizes teacher preparation programs offered by Oregon higher education institutions.

Students

WOU students are primarily Oregonians (76.4% of undergraduates, 86% of graduate students¹²) and enrolled full-time (84% of undergraduates). According to the Higher Education Coordinating Commission, WOU's fall 2016 percentage of underrepresented minority students (21.2%) was the highest percentage of fall enrollment among Oregon public universities.¹³ In fall 2016, WOU's student population included 705 Hispanic undergraduates and 145 Native Hawaiian and Pacific Islanders, an increase of 25% and 20.8% respectively from the previous year. For the first-time, full-time freshmen who entered in fall 2010, the graduation rate¹⁴ was 20% by the end of the fourth year, 35.3% by the end of the fifth year, and 39.4% by the end of the sixth year. (This does not include students who transferred to, and graduated from, other Oregon public universities.) As of fall 2016, the student-to-faculty ratio¹⁵ is 14 to 1, based on enrollment of 4,701 students.

Faculty

WOU has 400 instructional faculty (164 tenured or tenure-track faculty, 127 full-time and 109 part-time non-tenure-track faculty¹⁶). Within the full-time¹⁷ instructional faculty, 69.8% hold a terminal degree (doctorate or terminal master's), 27.1%, a master's degree, and 3%, a bachelor's degree. Within the part-time instructional faculty, 14.7% hold a terminal degree, 79%, a master's degree, and 6.3%, a bachelor's degree. There are 53 full-time and seven part-time research faculty. The 2015-2017 faculty [collective bargaining agreement](#)¹⁸ requires a terminal degree for rank of professor, associate professor, or assistant professor; a master's degree for a non-tenure-track instructor; and a bachelor's degree for the rank of lecturer. Women comprise 56% of faculty across all ranks; 17.3% of faculty self-identify as members of minority groups.

¹² Gray Book, Fall Fourth Week, 2016-17.

¹³ WOU 2016 University Evaluation, Higher Education Coordinating Commission, pg. 10.

¹⁴ 2016-2017 IPEDS submission; IPEDS graduation rate is based on degrees conferred September 1-August 31.

¹⁵ As reported in 2016 Common Data Set; ratio is calculated as the total full-time students plus one-third of part-time students to full-time faculty plus one-third part-time faculty.

¹⁶ 2016-17 Common Data Set

¹⁷ Full time is defined as working at equal to or over .5 full-time equivalent (FTE); part time is less than .5 FTE.

¹⁸ Agreement: http://www.wou.edu/hr/files/2016/03/WOUFT_CBA_2015-2017.pdf

Update on Institutional Changes since Year 7 Report in April 2016

Effective September 2016, Dr. Sue Monahan, former dean of the College of Liberal Arts and Sciences became associate provost for Academic Effectiveness. In this role, Dr. Monahan builds on her work with the Assessment Facilitation Steering Committee and university faculty to create and nurture a university-wide system of alignment and assessment for curriculum. The change is intended to accelerate WOU's efforts to meet NWCCU-mandated benchmarks for student-learning outcomes across all courses, programs and degrees. Dr. Rob Winningham, former division chair for Behavioral Sciences, is serving as interim dean during the national search for a new dean. The new dean is expected to start summer 2017.

A national search for a director of Institutional Research and Effectiveness opened in late December, with final candidates visiting campus in early March 2017. The creation of this new position addresses the critical need for deeper analyses of institutional data, allowing for better decision-making and for a more-informed process for setting targets for mission fulfillment.

Finally, the institutional strategic planning process that began in April 2016 (as reported in the 2016 Year Seven Report) culminated in [*Forward Together: 2017-2023*](#).¹⁹ This plan (Appendix A) establishes a new mission, statement of vision, values and purpose, and institutional priorities for the university. *Forward Together* was developed through the work of a 25-member committee composed of faculty, staff, students, members of the Board of Trustees, and community representatives. The panel was co-chaired by President Rex Fuller and Dr. Laurie Burton, immediate-past Faculty Senate President. The Board of Trustees approved *Forward Together* on Jan. 25, 2017.

Now that the strategic plan is complete, WOU leadership will begin developing a process that links budget decisions to strategic directions. The University Budget Committee (Appendix F) will begin meeting in March 2017. The committee will include broad-based participation from all governance groups and be representative of campus populations.

WOU leadership is developing plans for a new University Council that will review progress reports on mission fulfillment related to core themes, objectives, and indicators. Members of the council will include representatives from student, faculty and staff governance groups, cabinet officers, and directors and deans of key units. (Greater detail on the role of the University Council may be found in WOU's responses to Recommendations 2 and 3.)

¹⁹ Forward Together: <http://www.wou.edu/planning/strategic-planning-documents/>

ELIGIBILITY REQUIREMENTS 2 and 3

Eligibility Requirement 2. Authority

The institution is authorized to operate and award degrees as a higher education institution by the appropriate governmental organization, agency, or governing board as required by the jurisdiction in which it operates.

Western Oregon University was originally authorized to offer associate, baccalaureate and master's degrees by Oregon Revised Statute 352.355 until June 30, 2015, with oversight authority held by the Oregon State Board of Higher Education and the Oregon University System. This changed with the enactment of Senate Bill 80, which ended the Oregon University System and the State Board of Higher Education. Changes are summarized in the Oregon State Bar's [summary of 2015 legislation](#)²⁰:

Senate Bill 80 abolished the Oregon University System and the State Board of Higher Education. The board's duties, powers, functions, and lawfully incurred rights and obligations pertaining to a university with a governing board are transferred to and vested in the university's governing board. Any administrative rules and policies adopted by the board continue in effect until superseded or repealed by the standards or policies of a university or its governing board.
Oregon State Bar, 2015 Oregon Legislation Highlights, pages 1-19.

The Western Oregon University Board of Trustees was officially empaneled July 1, 2015. [Bylaws](#)²¹ establish the board's authority to govern the university, and the [Board Statement on Delegation of Authority](#)²², Section 1.7, provides information concerning the academic authority held by the board:

1.7.1 The Board has the authority to establish, eliminate, control or substantially reorganize academic programs and units of operation. Any significant change in the University's academic programs as defined by the Higher Education Coordinating Commission must be approved by the Board prior to submission to the Commission. The Board confers academic degrees, certificates and other forms of recognition upon the recommendation of the faculty. Such academic degrees, certificates and other forms of recognition are granted in the name of the Board of Trustees of Western Oregon University and are executed by the Board Chair and the University President. The Board shall have the exclusive authority to approve honorary degrees.

1.7.2 The Board delegates to the President and the professors ("the faculty" as defined in ORS 352.146) authority relating to: (a) academic standards relating to admission to study at the University; (b) curriculum, curricular materials, method of instruction, grading, credits, and academic standards of the University; and (c) standards of student competence in a discipline.

²⁰ Summary of 2015 legislation: https://www.osbar.org/_docs/lawimprove/2015LegislationHighlights.pdf

²¹ WOU Board of Trustees Bylaws: http://www.wou.edu/board/files/2014/10/WOU_Bylaws1.pdf

²² http://www.wou.edu/board/files/2014/10/Board_Statement_on_Delegation_of_Authority.pdf

Eligibility Requirement 3. Mission and Core Themes

The institution's mission and core themes are clearly defined and adopted by its governing board(s) consistent with its legal authorization and are appropriate to a degree-granting institution of higher education. The institution's purpose is to serve the educational interests of its students and its principal programs lead to recognized degrees. The institution devotes all, or substantially all, of its resources to support its educational mission and core themes.

The institutional strategic planning process concluded Jan. 25, 2017, with the Board of Trustees voting to adopt the plan. At the same meeting, the board approved a new mission statement, which has been forwarded to the Higher Education Coordinating Commission for formal review at its April 2017 public meeting. University leadership is now taking action on defining the process by which the university will monitor, measure and communicate progress on the plan. This included the creation of the University Council, described earlier under 'Update on Institutional Changes'.

WOU's highest priority is to serve the educational interests of its students with purposeful and validated degree programs. Degree programs are reviewed by the Faculty Senate Curriculum process and are approved by the Board of Trustees. New programs are reviewed by the statewide Provosts Council, which is composed of provosts from the seven public universities, as well as by the Higher Education Coordinating Commission, before submission to NWCCU for authorization.

WOU has worked to ensure learning goals and outcomes are defined for all courses across all programs. As described earlier, Associate Provost for Academic Effectiveness Dr. Monahan has been charged with leading efforts to create and nurture a university-wide system of alignment and assessment for curriculum. This change is intended to accelerate WOU's efforts to meet NWCCU-mandated benchmarks for student learning outcomes across all courses, programs and degrees.

Substantially all of the university's resources support its educational mission. This fact is demonstrated by the percentage of 2015-16 general fund expenditures used for instruction, research and public service (53%) and academic or student support services and financial aid (28.3%). Together, these expenditures account for more than 80% of the total general fund. The remaining balance of expenditures includes administration, expenses for shared services among the public universities, physical plant and other expenses (18.6 %). A detailed financial report for the 2015-2016 year can be found on the [Office of Finance and Administration](http://www.wou.edu/financeandadministration/documents/) website.²³

²³ Office of Finance and Administration: <http://www.wou.edu/financeandadministration/documents/>

STANDARD 1.A MISSION

1.A.1. Mission: The institution has a widely published mission statement -- approved by its governing board -- that articulates a purpose appropriate for an institution of higher learning, gives direction for its efforts, and derives from, and is generally understood by, its community.

Western Oregon University's 25-member Strategic Planning Committee defined the institution's mission with discussion and input from campus and community members over a nine-month period. The mission statement was [approved](#)²⁴ January 25, 2017, by the WOU Board of Trustees. In accordance with Oregon statutes, the mission was then submitted to HECC for review at its April 2017 meeting. The mission statement is currently available on WOU's [website](#)²⁵ within the strategic plan but will be disseminated more widely online and in print materials (e.g., application materials, course catalog) after HECC approval is received.

Western Oregon University creates lasting opportunities for student success through transformative education and personalized support.

This mission prioritizes WOU's purpose to create *lasting opportunities for student success*. It highlights *lasting opportunities* because academic achievement is a gateway to lifelong learning as well as future opportunities for WOU's graduates, their families, and the communities WOU serves throughout Oregon. Students who undertake degree programs do so to achieve an end state: a degree, certificate, or teaching endorsement. Because Oregon's governor and legislators name degree completion as the most critical component of the HECC's annual evaluation of public universities and the basis for public funding²⁶, WOU has also defined *student success* as degree completion.

Student success is achieved through transformative education and personalized support. *Transformative education* requires the creation of a campus environment that enhances learning. Academic excellence is expressed through curricular and co-curricular programs whose design both develops in students the knowledge and skills expected in their respective degree programs and also is transparent, intentional, directional and cohesive. In working with students, WOU intends to clearly communicate why they are doing what they are doing and how the pieces of their education fit together.

Personalized support is provided across a campus-wide environment that includes significant faculty-student interaction, proactive student services, and efforts to accommodate student needs. For example, advising appointments are required each term for each student; undeclared majors are served by professional advisors in the Academic Advising and Learning Center and students with declared majors are assigned faculty advisors from that academic program.

²⁴ Summary of Board of Trustee's January 25, 2017 meeting: <http://www.wou.edu/board/files/2015/10/Jan-25-2017-Meeting-No-17-Summary-Sheet.pdf>

²⁵ Strategic Plan available at: http://www.wou.edu/planning/files/2016/05/Forward_Together_2017_23.pdf

²⁶ Student Success and Completion Model overview available at: <https://www.oregon.gov/highered/Documents/HECC/Resources/Finance/FINALOregonSSCMTwo-Page2102016.pdf>

In addition to the new mission statement, the new strategic plan articulated five institutional priorities: 1) Student Success, 2) Academic Excellence, 3) Community Engagement, 4) Accountability, and 5) Sustainability and Stewardship. The latter three priorities are defined as broad *operational imperatives* that help define goals for how WOU and its members will conduct the institution's affairs. The first two institutional priorities, however, were designated as "core themes" for NWCCU accreditation because they are derived directly from the mission statement.

1.A.2. Mission: The institution defines mission fulfillment in the context of its purpose, characteristics, and expectations. Guided by that definition, it articulates institutional accomplishments or outcomes that represent an acceptable threshold or extent of mission fulfillment.

WOU's new strategic plan clarified its mission and defined five institutional priorities, two of which are articulated as core themes: Student Success and Academic Excellence. These core themes are supported by nine objectives that rely on 14 indicators that enable the institution to assess progress on meeting the desired objectives. (Indicators are displayed under 1.B. Core Themes.)

WOU has established a process by which the institution may articulate its assessment of progress of overall institutional progress toward mission fulfillment.

First, WOU established meaningful, assessable, and verifiable indicators of achievement.

Indicators have been assigned two levels of target goals. The Level 1 Goal is the minimum acceptable level of performance. The Level 2 Goal is a higher target for performance. (The full set of objectives and indicators is included under Standard 1.B.)

Indicators and goals are defined specifically to ensure they are assessable and verifiable. (The data to be used to evaluate performance is documented in the provost's operations files.) Data types are internal institutional data or standardized data from national sources (e.g. IPEDS, NSSE, College Results Online), which provides comparison results for WOU and a WOU-defined national peer group.

Second, WOU has defined how to evaluate performance based on indicator results.

WOU will systematically review achievement data for each metric against that indicator's target goals. Assessment reviews will be managed by the appropriate authority, such as a designee of the president, the Academic Affairs offices under the provost (Appendix D) or the director of institutional research.

WOU has defined how achievement data will be translated into three categories: below expectations, meets expectations, and exceeds expectations. If the institution meets the Level 1 Goal, that indicator will receive a rating of "meets expectations" for progress toward mission fulfillment. However, if the institution fails to meet the Level 1 Goal, that indicator will receive a rating of "below expectations." All indicators that are below expectations will subsequently require a review of institutional plans and efforts leading to a written action plan for remediation. This action plan will be included in the report to the University Council. If the institution meets the Level 2 Goal, the indicator will receive a rating of "exceeds expectations."

Preliminary reports on achievement will be reviewed in order to assess obstacles and opportunities for institutional improvement; the provost will assign responsibility for developing action plans. The provost’s directors and staff, working with the director of institutional research, will annually compile a full report of accreditation assessment results. Whenever WOU has not met expectations for target goals, an action plan for improvement will be included with the results report.

Third, WOU has determined how to summarize performance across all indicators.

Academic Affairs (with Institutional Research) will be compiling all ratings and noting achievement results into a preliminary summary matrix (as seen in Table 3, here and under Response to Recommendation 3). For example, if the data reflects achievement for indicator 1 “exceeds expectations,” that column would be highlighted in green. Thus, the summary matrix provides a visual overview of progress on mission fulfillment based on color coding in order to focus internal reviewers’ attention to the more critical problem areas.

This matrix (and supporting details, data or action plans) will be provided to the University Council for its annual review of mission fulfillment. The council will use these materials, as well as qualitative attributes such as value and difficulty of efforts undertaken, to review the preliminary matrix and make any adjustments deemed appropriate. Then, it will conduct a holistic assessment of institutional progress based on all indicators’ outcomes and make a recommendation of overall institutional progress on mission fulfillment to the president. This process enables a review of achievement of all indicators by the broadly representative members of the University Council who may have a range of experience in accreditation and institutional metrics.

Table 3: Summary Matrix

Objectives	Indicator	Below Expectations	Meets Expectations	Exceeds Expectations
Programs can be completed in a timely and efficient manner	Undergraduate annual calculation for six-year graduation rate (based on full-time, first-time cohort)	[RED]	[BLUE]	[GREEN]

Finally, WOU has preliminary plans for communicating and integrating results.

Communicating results to critical groups is vital for ongoing institutional improvement. The provost will regularly update the President’s Cabinet and University Council to ensure integration with other institutional planning efforts. The University Council is charged with monitoring progress on strategic plan initiatives, as well as reviewing and assessing overall institutional achievement toward mission fulfillment. Therefore, its review and subsequent overall evaluation that is recommended to the president will also inform the Council’s subsequent decision-making related to strategic plan initiatives. The annual September ‘State of the University’ address to campus members at the start of the academic year, and the October Board of Trustee meetings provide opportunities for annual progress reports to

constituents. Results that are shared are expected to inform the work of the Board and its committees, as well as campus units through the administrative structures.

All of these progress reports are intended to include the extent to which WOU is meeting its progress goals, as well as action plans to improve where performance is below specified expectations. The university is investigating a user-friendly online dashboard or other data repository to communicate progress to campus members. The design and implementation of that dashboard will begin after the director of Institutional Research is hired.

In summary, WOU not only has identified outcomes (objectives) that represent “mission fulfillment,” but also has defined a framework for evaluating progress toward those objectives. This framework is based upon meaningful, assessable, and verifiable indicators, as well as explicitly defined target goals that allow for a consistent evaluation of efforts as “below expectations,” “meets expectations,” or “exceeds expectations.” The results will be compiled into a preliminary summary matrix that categorizes results by color, to assist the University Council in reviewing results and making a determination if any adjustments are needed. The final matrix will help the University Council make their assessment of overall university progress on mission fulfillment, which is needed before offering their recommendation to the president. This process overall allows for a clear and transparent assessment of, and communication about, results to WOU’s campus community.

CORE THEMES

1.B.1 Core Themes: The institution identifies core themes that individually manifest essential elements of its mission and collectively encompass its mission.

Five institutional priorities were articulated within the 2017-2023 strategic plan. The first two are key elements in the mission statement and therefore have been identified as the core themes with which to focus mission fulfillment efforts. The remaining three priorities (Community Engagement, Accountability, and Sustainability and Stewardship) will help to guide operational practices. The mission statement and WOU's two core themes are:

Western Oregon University creates lasting opportunities for student success through transformative education and personalized support.

Core Theme 1. Student Success

Student success – specifically degree completion – is made possible through an accessible curriculum, attainable programs, supportive structures, and personalized services.

Core Theme 2. Academic Excellence

WOU provides an academic environment of well-defined curricular and co-curricular opportunities that enable students to engage in purposeful learning experiences.

Individually, these core themes are each essential to the mission. Collectively, they illuminate the mission's intent that WOU is first and foremost focused on academic program quality in which students achieve expected competencies, demonstrate learning, and successfully complete their degrees. WOU's core themes and their objectives are also aligned with the [equity lens](#)²⁷ adopted by HECC in 2014. WOU is mindful of the importance of time to graduation (which increases cost and therefore creates an obstacle to completion) and the overall cost of attendance, particularly as it pertains to the graduation rate of under-represented minorities, students with financial need, or students from rural Oregon counties.

Although WOU, as a public university, may also be expected to serve the public good (e.g., community outreach or partnerships), those activities have not been prioritized as core themes at this time because they are not essential to WOU's core academic purpose. Such activities are also not a critical part of the university's performance evaluations by the HECC and do not factor into calculations for state appropriations funding.

²⁷ Equity Lens: https://www.oregon.gov/HigherEd/Documents/HECC/Reports-and-Presentations/Presidents_letter_Equity_Lens.pdf

1.B.2. Core Themes: The institution establishes objectives for each of its core themes and identifies meaningful, assessable, and verifiable indicators of achievement that form the basis for evaluating accomplishment of the objectives of its core themes.

WOU’s core themes and their objectives are summarized in Table 1 below (and as seen earlier under Response to Recommendation 2). Additional detail related to the indicators and desired levels of achievement follow in tables under each core theme.

Table 1: Core Themes and Objectives

<p>CORE THEME 1 STUDENT SUCCESS</p> <p>Student success – specifically degree completion – is made possible through an accessible curriculum, attainable programs, supportive structures, and personalized services.</p>	<p>OBJECTIVES:</p> <ol style="list-style-type: none"> 1. WOU curriculum is offered across multiple delivery pathways. 2. WOU programs can be completed in a timely, efficient manner. 3. WOU student services facilitate student persistence and success. 4. Students perceive positive, personalized interactions with WOU faculty and staff. 5. WOU strives to limit financial hardship that interferes with student persistence.
<p>CORE THEME 2 ACADEMIC EXCELLENCE</p> <p>WOU provides an academic environment of well-defined curricular and co-curricular opportunities that enable students to engage in purposeful learning experiences.</p>	<p>OBJECTIVES:</p> <ol style="list-style-type: none"> 1. WOU demonstrates alignment across course, program and university learning outcomes. 2. Academic and co-curricular programs are responsive to the evolving needs of students. 3. WOU champions outstanding teaching as well as scholarship, research and creativity to promote student learning. 4. Students participate in high-impact learning practices.

CORE THEME 1: Student Success

To promote student success, curricula must be accessible to the full range of potential students. In order to meet this need, delivery modes must extend beyond the traditional on-campus, 8 a.m. to 5 p.m. course offerings. Furthermore, time to degree is a critical variable for accessibility because extended time leads to increased costs. Thus, the curriculum should be attainable in 180 credits/four years. This benchmark requires that degree programs (including majors, general education, and other university requirements) are designed so that students may have a reasonable expectation of completing their degree in a timely manner. Improving the quality and efficiency of degree programs is intended to lead to improvements in goals critical to mission fulfillment; students graduate at a higher rate with fewer excess credits in a shorter time frame and with overall lower cost (controlling for other student characteristics).

Finally, WOU must prioritize supportive structures and personalized service and do so in a way that *anticipates* obstacles WOU students may face in navigating unfamiliar institutional systems. Many WOU current and potential students are “new majority” (i.e. first-generation, low-income or immigrant students). Such students bring strengths and value to the institution, but they may not have the social and cultural capital (e.g., knowledge of institutional systems, mentorship from people with familiarity with the complexities of higher education) needed to navigate specific programs, processes and structures. In order to fulfill the mission of student success, it is incumbent upon WOU to design transparent and student-friendly systems and foster relationships with students that enable WOU to proactively guide them toward important services (e.g., advising) and opportunities (e.g., internships, co-curricular programs, and leadership opportunities). Altogether, the indicators are meaningful, the stipulated measures (direct and indirect) are assessable, and all evidence can be verified by internal and external reviewers.

Core Theme 1 is displayed in Table 4, which conveys the five objectives, nine indicators, and two goal levels that will be used to assess achievement and progress toward mission fulfillment as it relates to student success. In several of the indicators, a “comparator group” is indicated. This group is a national group of ten degree-granting public higher education institutions (four year or above) matched on the basis of IPEDS data variables such as institutional size, geographic region, degree of urbanization, existence of a tenure system, percent of undergraduates receiving any financial aid or receiving Pell grants, and percent admitted.

TABLE 4: CORE THEME 1- Student Success

Student success – specifically degree completion – is made possible through an accessible curriculum, attainable programs, supportive structures, and personalized services.

Objectives	Indicator #	Indicator Description	Level 1 Goal	Level 2 Goal
Curriculum is offered via multiple delivery pathways.	1	Percent of courses with at least one section offered via flexible course format during the academic year. <i>(off-campus, evening, online, hybrid, weekends)</i>	Percent of courses increases from same measure in previous year.	25% of courses have at least one section offered via flexible format during academic year.
Programs can be completed in a timely and efficient manner.	2	Undergraduate annual calculation for six-year graduation rate, for first-time, full-time student cohort.	WOU’s six-year graduation rate is equal to or above rolling five-year average for WOU’s six-year graduation rate.	WOU’s six-year graduation rate is equal to or above the median value of the comparator group’s rolling five-year average six-year graduation rate.
	3	Total credits at graduation for first-time, full-time students.	Current year is equal to or below the five-year rolling average.	Greater than 80% percent of UG graduates have less than 200 credits.
	4	Percent of programs that can be completed within 180 credits.	Annual percent of programs increases over previous year total.	100% of programs can be completed within 180 credits.
Student services facilitate student persistence and success.	5	Retention for undergraduates from year 1 to year 2 for first-time, full-time student cohort.	Current year is equal to or above the five-year rolling average for previous year.	WOU’s retention rate is equal to or above the median value of the comparator group’s five-year rolling average.
	6	Graduation rate for undergrad and grad students who are under-represented minority (URM), veterans, Pell grant recipients, or high school graduates from rural counties.	a) Achievement gap between URM and majority students does not increase annually, and b) achievement gap between URM and majority students shows decrease in rolling five-year average.	Achievement gap between URM and majority students is equal to or lower than the median value of the comparator group’s rolling five-year average achievement gap.
	7	Students’ perception of supportive campus environment at WOU (overall, academic, social, learning support, etc.).	Maintains mean value that is statistically comparable to comparator group’s results.	Significantly higher difference in mean value for both first-year and senior students in comparison to comparator group.

Table 4: Core Theme 1 – Student Success (continued)

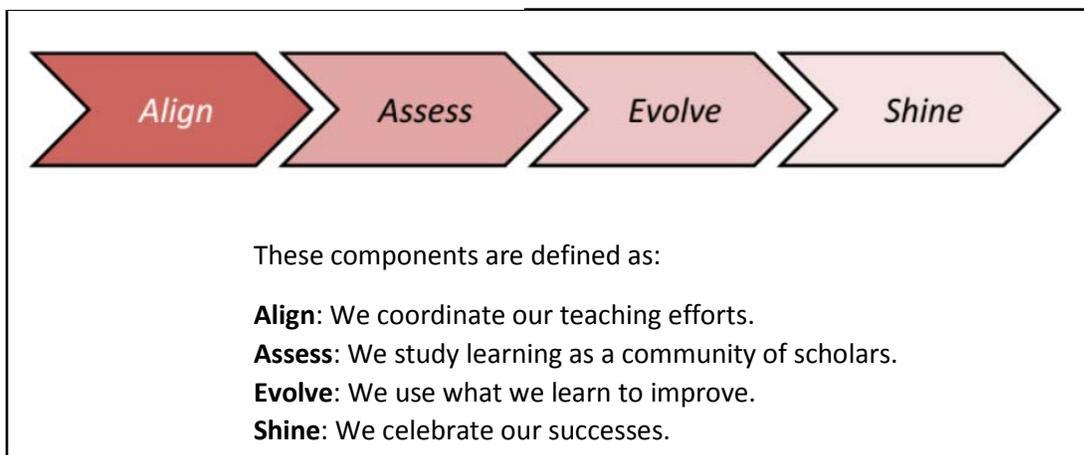
Objectives	Indicator #	Indicator Description	Level 1 Goal	Level 2 Goal
WOU provides positive, personalized interactions between students and faculty.	8	Students’ perception of frequency of student-centered interactions with faculty.	Maintains mean value that is not significantly different from comparator group’s value.	Significantly higher difference for both first-year and senior students in comparison to national peer institutions.
WOU strives to limit financial hardship that interferes with student completion.	9	Cost of attendance is limited by managing tuition and fees as well as increasing various forms of assistance to WOU students.	WOU is at median of all Oregon public universities, for average net price for all students, and average net price for middle-income students.	WOU is within top two of seven Oregon public universities for both items: average net price for all students and average net price for middle-income students.

CORE THEME 2: Academic Excellence

WOU's degree programs are integral to providing an educational experience leading to student success. Academic effectiveness focuses on assessing student learning across all courses, programs, and university requirements. Achieving alignment between stated program outcomes and program curricula ensures that students have the opportunity to gain the knowledge and skills expected of graduates.

Figure 3 is a graphic representation used internally to highlight the meaning and value of alignment:

Figure 3: Value of Alignment to WOU



Core Theme 2's first two objectives (indicator #10 and #11 on chart) focus on the outcomes of the process: the demonstration of alignment and a reiterative regular review process. The first ensures a "purposeful learning experience," and the second enables "programs that are responsive to the evolving needs of students." In both cases, progress tracking will be ongoing with information available on the Academic Effectiveness [website](#)²⁸ (to be defined further in the fall 2017 Ad Hoc Report). Therefore, the indicators are meaningful, the stipulated measures (direct and indirect) are assessable, and all evidence can be verified by internal and external reviewers. The next two objectives (indicators #12, #13, and #14) speak to WOU's emphasis on championing academic excellence. First, outstanding teaching is assessed based on students' perceptions of academic challenge in their courses. Research, scholarship, or creative activity is grounded in student participation through two institutional venues that promote those efforts. Then, in recognition of the value of [high-impact practices](#)²⁹ to students' academic and personal development, WOU will track students' participation in high-impact practices within courses or through co-curricular opportunities. Overall, these objectives and their indicators are measurable, assessable, and verifiable by internal or external reviewers. Table 5 (Core Theme 2) conveys the objectives, indicators and goal levels that will be used to assess achievement and progress toward mission fulfillment as it relates to academic excellence.

²⁸ Academic Effectiveness website: <http://www.wou.edu/cai/initiatives/assessment/>

²⁹ The American Association of American Colleges & Universities defines high-impact practices here: <https://www.aacu.org/resources/high-impact-practices>

Table 5: CORE THEME 2 – Academic Excellence

WOU provides an academic environment of well-defined curricular and co-curricular opportunities that enable students to engage in purposeful learning experiences.

Objectives	Indicator #	Indicator Description	Level 1 Goal	Level 2 Goal
Demonstrated alignment across course, program and university learning outcomes.	10	Percent of curriculum with alignment among course, program, and university learning outcomes.	All newly proposed courses and programs (through Faculty Senate Curriculum process) are fully aligned.	100% alignment by January 2018.
Academic and co-curricular programs are responsive to evolving needs of students.	11	Completion of program reviews per seven-year program review schedule.	Program reviews were completed or in progress according to the schedule for the year.	All programs have completed program reviews by the end of the seven-year review cycle.
WOU champions outstanding teaching, research, and scholarship that serve student success.	12	Teaching at WOU involves opportunities for students to be academically challenged. (NSSE: Academic Challenge scale)	Maintains mean value (on each of four sub-scales) that is not significantly different from national peer institutions.	Significantly higher difference for both first-year and senior students in comparison to national peer institutions.
	13	Students demonstrate scholarship, research, or creative activity.	Maintain annual number of students who have presented at Academic Excellence Showcase and who have published work in <i>Pure Insight</i> journal.	Increase number of students who present at Academic Excellence Showcase and publish in <i>Pure Insights</i> journal.
WOU students engage in high-impact learning practices (HIP).	14	WOU students take advantage of opportunities at WOU to participate in high-impact learning opportunities.	Percentage of seniors who have participated in at least one HIP increases for each administration of NSSE.	Achieve percentage of seniors who have participated in two or more HIP to level that is comparable to national peer institutions.

CONCLUSION

Since the Year Seven Report was filed with the NWCCU in 2016, the Western Oregon University community has undergone a focused, intensive engagement in examining the university mission through the strategic planning process. Significant public discussion among multiple constituencies has resulted in a new and clarified statement of the university's mission as well as the strategic and tactical means by which that mission is pursued.

The mission and core themes adopted by the Board of Trustees in January 2017 focus the university for the future. Further, the institution's response thus far to the Commission's recommendations from the Year Seven review (April 2016) demonstrates that university leadership is committing significant resources to give concerted attention to those recommendations. The institution also is developing a process for tracking overall mission fulfillment to ensure its accountability and responsiveness to its constituencies. This includes a new University Council charged with reviewing our progress on mission fulfillment as well as our adherence to the new strategic plan.

WOU's framework for evaluating mission fulfillment is demonstrated through the core themes, their objectives, and their indicators. This framework articulates achievement goal levels so that the institution may determine whether efforts meet expectations for mission fulfillment. Future reports on progress will include not only evidence on performance but also action plans to remediate less-than-satisfactory results. The Western Oregon University faculty, staff, and leadership have always been dedicated to providing students with a transformative education in a student-centered learning environment. We look forward to working with the Northwest Commission on Colleges and Universities in future accreditation reviews.

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Appendices

Appendix A: 2017-2023 WOU Strategic Plan: Forward Together

Appendix B: WOU Board of Trustees

Appendix C: Overview Student Success and Completion Model

Appendix D: Academic Affairs Organizational Chart

Appendix E: Western Oregon University Organizational chart

Appendix F: Western Oregon University Alignment of Budget and Planning



Appendix A

FORWARD TOGETHER 2017-23

WOU'S STRATEGIC FRAMEWORK

WOU'S MISSION, VISION,
VALUES AND PURPOSE





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February 2017

Dear Colleagues and Community Members,

We are pleased to share *Forward Together: 2017-2023*, Western Oregon University Strategic Plan. The plan was developed over a nine-month period that started in April 2016 and culminated with a unanimous recommendation from the Strategic Planning Committee (SPC) to send the plan to the WOU Board of Trustees for final approval. The 25-member SPC was committed to an open and transparent planning process. The spirit of collaboration and optimism about Western's future is captured by our title *Forward Together*, and by our overarching commitment to student success.

Throughout the nine-month process, the committee shared its thinking and planning ideas with the larger campus community via multiple interactive town halls. Additionally, members of the SPC shared updates with smaller groups throughout the process as the plan took shape. The committee worked collaboratively in smaller teams to tackle various aspects of the planning process from a review of strengths, weaknesses, opportunities and threats to the development of a new mission statement. Our new mission statement supports our reaffirmation of our university's values and our vision to be renowned for student success.

The Western Oregon University Strategic Plan is organized around five institutional priorities: student success, academic excellence, community engagement, accountability and sustainability and stewardship. These priorities are grounded in the values and deep history of Western. Throughout its history, WOU has responded to the expressed needs of the citizens of Oregon and WOU graduates have led productive, meaningful lives in communities throughout our state and beyond.

On January 25, 2017, the Western Oregon University Board of Trustees unanimously adopted this strategic plan with the clear expectation that it would guide the future directions and actions of the university. Our plan, *Forward Together*, is expected to be dynamic and responsive to changing conditions in the higher education environment. This roadmap will guide the development of action items and initiatives that further the university's mission.

As co-chairs of the committee, we are extremely proud of the work done by members of the Strategic Planning Committee. We know this plan took shape because of the profound commitment of our caring colleagues and community members. Our work was guided by the expert leadership of our facilitator, Ginny Lang, whose insights into higher education policy helped us frame our plan for the future. We are confident that *Forward Together* will form the basis for a renewed commitment to student success.

With deep appreciation,

Rex Fuller

Rex Fuller, President and Co-chair

Laurie Burton

Laurie Burton, Co-chair

MISSION, VISION, VALUES AND PURPOSE

OUR MISSION

Western Oregon University creates lasting opportunities for student success through transformative education and personalized support.

OUR VISION

To become Oregon's campus of choice for students, faculty and staff who seek a student-centered learning community.

Western Oregon University will achieve this vision by:

- Cultivating student success through personalized attention, mentoring and degree attainment.
- Raising awareness of our strengths, successes and contributions to the community through increased public outreach.
- Adapting to the changing world through continuous institutional improvement, evolving pedagogies and expertise, sustained scholarly and creative activities, and delivery of critical and innovative programs.
- Aspiring to standards of excellence in all programs.
- Challenging students, faculty and staff to grow profoundly through inspiring, thought-provoking educational experiences.
- Connecting students with communities through engagement in service, experiential learning, creative problem-solving opportunities and co-curricular collaborations.
- Supporting the inclusion of, respect for, and appreciation of all communities of students, faculty and staff.
- Promoting the well-being of students, employees and the environment.

OUR VALUES

Our practices are guided by our values:

- **Accessibility**
Programs, resources, media and structures that support the needs of our community members; affordable cost of attendance; personalized support; welcoming, efficient and user-friendly systems.
- **Accountability**
Evidence-based decision making, integrity and ethical transparency.
- **Collaboration**
Effective communication; cooperative exploration, problem solving, and teamwork; shared governance; dialogue.



MISSION, VISION, VALUES AND PURPOSE

Continued from previous page

- **Community**
Trustworthy, caring, safe environment for the cultivation of peace, civility and social justice; connections extending beyond the classroom, across campus and into our local and global communities.
- **Diversity and respect**
Equity and inclusion; a fundamental basis in human diversity; appreciation for the complexity of the world; strength drawn from our variety of backgrounds, abilities, cultural experiences, identities, knowledge domains and means of expression.
- **Empowerment**
Knowledge, skills, pathways, technologies and resources for all community members to effectively identify and utilize opportunities; student success in degree attainment; critical thinking.
- **Excellence**
High standards for teaching, learning, scholarship and service; co-curricular activities; advancement of knowledge, analytical skills, creativity and innovation.
- **Sustainability and stewardship**
Leadership in service of the public good; action to improve the health of our planet; responsibility for preserving and enhancing the natural, structural, financial, intellectual and human resources entrusted to us.

OUR PURPOSE

As the first public institution of higher education established in Oregon, we uphold an enduring commitment to the value of teaching and learning. Our academic and co-curricular activities enhance the economic, cultural and intellectual vitality of our region and the larger world. To serve the greater good, we educate individuals in an accessible and supportive environment.

Our undergraduate students enjoy a personalized experience in a comprehensive, mid-sized public university. The knowledge and abilities cultivated in our graduate programs meet compelling needs for work, service and leadership beyond our campus. Western Oregon University empowers its students, employees and alumni to lead meaningful, responsible lives.



INSTITUTIONAL PRIORITIES

I. STUDENT SUCCESS

II. ACADEMIC EXCELLENCE

III. COMMUNITY ENGAGEMENT

IV. ACCOUNTABILITY

V. SUSTAINABILITY AND STEWARDSHIP



I. STUDENT SUCCESS

Promote student success, learning and graduation through personalized support in a student-centered education community.

1. Cultivate academic success.

- 1.1 Provide a campus environment that enhances learning and the development of the whole person.
- 1.2 Strengthen and centralize programs and practices that support academic achievement for all students.
- 1.3 Strengthen programs that support graduates' career, professional, and graduate school preparedness.

2. Streamline university requirements and academic pathways to graduation.

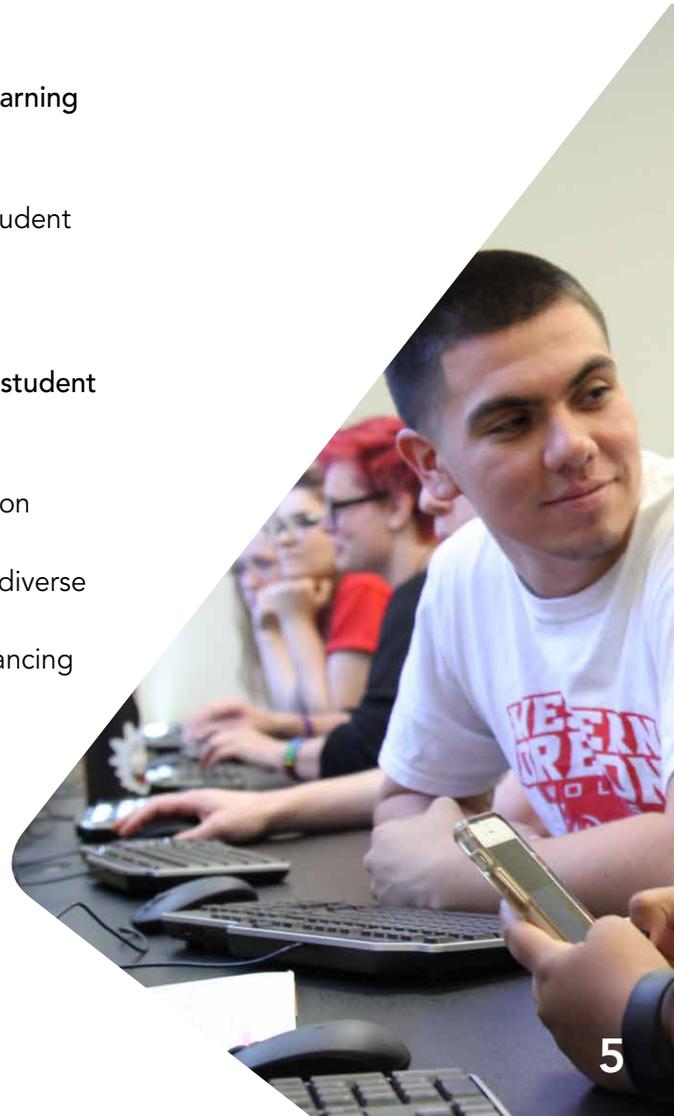
- 2.1 Provide intentional and effective paths to graduation within 180 credits.
- 2.2 Provide intentional and effective transfer paths to graduation.
- 2.3 Improve access to coursework for degrees, programs and certificates.

3. Align, assess and improve the academic effectiveness of learning outcomes.

- 3.1 Align curriculum with learning goals for all programs.
- 3.2 Improve curriculum based on effective assessment of student learning outcomes.
- 3.3 Support curricular innovation and accountability.

4. Streamline and improve university processes in support of student achievement.

- 4.1 Improve academic advising for all students.
- 4.2 Develop user-friendly catalog, scheduling and registration systems.
- 4.3 Provide culturally responsive support for students from diverse communities.
- 4.4 Strengthen commitment to diversity and equity by enhancing support and academic services for students.



II. ACADEMIC EXCELLENCE

Promote academic excellence in an engaged student-focused learning environment.

1. Student initiatives.

- 1.1 Ensure appropriate class sizes to maximize faculty-student and student-student interactions.
- 1.2 Increase support for programs and activities that demonstrate and inspire academic excellence.
- 1.3 Provide financial support for student conference presentations and other student activities that showcase the university's educational practices and unique accomplishments.
- 1.4 Implement student orientation programs that reflect diverse linguistic and cultural needs as well as differences in preparation and background.

2. Faculty initiatives.

- 2.1 Attract and retain faculty who reflect the diversity of our students and are excellent teachers and leaders in scholarly and creative pursuits within their respective fields of expertise.
- 2.2 Increase faculty development support for scholarly and creative pursuits as well as innovative curricular design and delivery efforts.
- 2.3 Provide competitive salaries and supportive working conditions that improve faculty recruitment and retention.
- 2.4 Increase faculty development support to implement culturally responsive pedagogy and curriculum.

3. Staff initiatives.

- 3.1 Attract and retain staff members who reflect the diversity of our students, excel in their areas of expertise and support academic excellence.
- 3.2 Increase professional development opportunities for staff in support of academic excellence and student achievement.
- 3.3 Provide competitive salaries and supportive working conditions that improve staff recruitment and retention.
- 3.4 Increase support for professional development for staff to provide culturally and linguistically responsive services.



II. ACADEMIC EXCELLENCE

Promote academic excellence in an engaged student-focused learning environment.

Continued from previous page

4. Academic program initiatives.

- 4.1 Promote academic array that provides distinctive, high-quality programs.
- 4.2 Develop internal processes that regularly review academic programs to ensure academic effectiveness, relevance, quality and currency.
- 4.3 Promote high-quality, diverse and innovative models of program delivery that enhance both undergraduate and graduate student access and achievement.
- 4.4 Promote interdisciplinary courses and degree programs that support collaborative and multidimensional educational experiences and pathways.
- 4.5 Redesign the general education program to be consistent with undergraduate learning outcomes and timely degree completion.

5. Identify and support activities, programs and practices that promote excellence in all academic programs.

- 5.1 Create opportunities for all undergraduate programs to include high-impact activities that support achievement of undergraduate learning outcomes.
- 5.2 Create opportunities for all graduate programs to include high-impact activities that support attainment of graduate learning outcomes.
- 5.3 Continue and enhance support for undergraduate research experience, presentation and publication opportunities.
- 5.4 Promote enhanced communication and collaboration between staff and faculty pertaining to student excellence.



III. COMMUNITY ENGAGEMENT

Create meaningful opportunities for lasting partnerships with local communities and regional and global organizations.

1. Enhance access to and support for experiential learning and co-curricular activities.
 - 1.1 Adopt experiential learning guidelines and align high-impact practices with these guidelines.
 - 1.2 Articulate internship or service learning opportunities for all academic programs.
 - 1.3 Develop experiential and co-curricular activities that provide appropriate accommodations for faculty, staff and students.

2. Increase institutional engagement with local, regional and global communities.
 - 2.1 Increase support for student engagement in community service.
 - 2.2 Provide professional development for faculty and staff to promote engagement in community service.
 - 2.3 Establish processes to recognize faculty, staff and students for public service.
 - 2.4 Create and enhance educational partnerships with local communities, particularly for underrepresented student groups.
 - 2.5 Enhance educational partnerships with international universities that promote global connections for faculty, staff and students.
 - 2.6 Strengthen partnerships with community organizations and businesses and local, regional and state government agencies.

3. Improve the connections between university programs and activities and surrounding communities.
 - 3.1 Expand activities and partnership with local and regional organizations.
 - 3.2 Increase community and alumni participation in, and support for, campus activities.

4. Support knowledge, experiences and activities that promote a better understanding of diversity-related topics.
 - 4.1 Enhance diversity of university community as a matter of institutional priority and an integral component of academic success.
 - 4.2 Provide professional development to improve institutional climate and personal commitment to, and understanding of, cultural competencies.
 - 4.3 Recognize that knowledge of, and experience in, diversity-related topics are professional competencies that are expected of all employees.



IV. ACCOUNTABILITY

Promote teamwork and transparency in budgeting, decision-making and the stewardship of resources.

1. Improve university budgetary systems.

- 1.1 Develop and implement a transparent, evidence-based budget model that supports institutional priorities.
- 1.2 Create campus budget advisory committee incorporating shared governance principles and budget transparency.
- 1.3 Align budget process with the current Strategic Plan, mission and core themes.
- 1.4 Maintain budget reserves to meet university Board of Trustees-approved policies.

2. Operate in manner that supports the university's values and continuous improvement.

- 2.1 Develop institutional research capacity.
- 2.2 Use institutional data to inform decisions, address program outcomes and meet strategic goals and accreditation standards.
- 2.3 Promote culture of evidence-based decision-making and accountability.

3. Strengthen the university's visibility within Oregon.

- 3.1 Create strategic communications and marketing unit.
- 3.2 Support and enhance effective marketing and consistent branding.
- 3.3 Utilize web presence, social media and other forms of media to expand the university's visibility.
- 3.4 Enhance public awareness of community events and the scholarly and creative works of students, faculty and staff to help showcase the university's unique accomplishments in all program areas.
- 3.5 Strengthen and expand community college partnerships to promote educational attainment.

4. Enhance and support campus communication systems.

- 4.1 Enhance communications systems to disseminate campus-wide information and share expertise, successes and challenges.
- 4.2 Improve teamwork and collaboration among students, faculty, staff and administration.
- 4.3 Provide sufficient resources to develop and maintain timely communication avenues, such as websites and social media.



V. SUSTAINABILITY & STEWARDSHIP

Promote effective university stewardship of educational, environmental, financial, human and technological resources.

1. Enhance financial sustainability through enrollment and fiscal strategies.

- 1.1 Meet enrollment targets through effective recruitment and retention efforts.
- 1.2 Support and enhance recruitment efforts for first-generation and underrepresented students, as well as a broad base of all Oregonians.
- 1.3 Support growth of academic programs to include new and innovative degrees and certificates.
- 1.4 Increase the role of long-term enrollment management planning in the budgeting processes.

2. Maintain access and affordability with regard to cost of degree attainment.

- 2.1 Evaluate net cost of attendance versus median household income relative to peers and comparator institutions to ensure access and affordability.
- 2.2 Provide students with meaningful financial support and effective connections as they transfer from other educational institutions.
- 2.3 Expand support for undergraduate scholarships in second, third and fourth years of attendance.
- 2.4 Evaluate and improve the outcomes of tuition-assistance programs on enrollment, retention, and graduation.
- 2.5 Evaluate assumptions underlying our current tuition cost structure and compare our system to other fiscally sustainable institutions.
- 2.6 Increase access to, and education about, scholarship opportunities, particularly for students of color, immigrants, rural and socio-economically disadvantaged students.

3. Diversify and expand revenue sources.

- 3.1 Cultivate sustainable financial resources to achieve goals of the strategic plan.
- 3.2 Advance financial resources through state appropriations, HECC, grants and WOU Foundation, ensuring all sources are considered and developed.
- 3.3 Develop and implement a comprehensive fundraising plan to secure external funds that support the mission and goals of the university.



V. SUSTAINABILITY & STEWARDSHIP

Promote effective university stewardship of educational, environmental, financial, human and technological resources.

Continued from previous page

4. Embed sustainability as a fundamental value.
 - 4.1 Develop and promote sustainability-focused programs and opportunities for the university, the community, alumni and university partners.
 - 4.2 Increase and support sustainable environmental systems for campus grounds, infrastructure and physical facilities.
 - 4.3 Ensure the availability and effective utilization of accessible and comfortable classrooms, offices and meeting spaces.
 - 4.4 Create systems and processes for identifying sustainability opportunities, challenges and innovations.

5. Provide effective technology solutions that support campus programs in alignment with the mission and goals of the university.
 - 5.1 Maintain IT solutions that incorporate best practices in higher education.
 - 5.2 Provide technical support for faculty, staff and students to meet the goals and mission of the university.
 - 5.3 Develop and implement short- and long-term IT plans that are responsive to the needs of students, faculty and staff.

6. Enlist the talents of faculty and staff to increase workplace satisfaction and develop a superior workforce.
 - 6.1 Provide professional development opportunities for faculty and staff that advance the university mission.
 - 6.2 Maintain appropriate staffing levels to ensure the continuity of programs, units and departments.
 - 6.3 Implement process improvements to improve satisfaction and productivity of faculty and staff.
 - 6.4 Provide resources that improve the safety of faculty, staff and students by developing and implementing emergency planning systems.



STRATEGIC PLAN COMMITTEE MEMBERS

Laurie Burton • Mathematics Department faculty
Adry Clark • Service Learning & Career Development director
Betty Crawford • Alumni Board member
Paul Disney • Business Division faculty
David Foster • Psychology Department faculty
Rex Fuller • WOU president
Camila Gabaldon • Library & Media Services faculty
Corbin Garner • WOU student
Megan Habermann • Student Engagement director
Mark Henkels • Political Science Department faculty
Ivan Hurtado '07 • WOU Board of Trustees
Cecelia Koontz • WOU Board of Trustees
Paul Kylo '79 • WOU Foundation Board member
Melanie Landon-Hays • Teacher Education Division faculty
Randi Lydum '90, '93 • Athletic Compliance director
Dave McDonald • Enrollment Management associate provost
Alma Pacheco (*in memoriam*) • WOU student
Peggy Pederson • Health & Exercise Science Division faculty
Adele Schepige • Teacher Education Division faculty
Chris Solario '05 • Student Enrichment Program assistant director
Linda Stonecipher • Graduate Programs director
Dan Tankersley • Art Department faculty
Ella Taylor • The Research Institute director
Steve Taylor • Earth and Physical Sciences Department faculty
Shelby Worthing • WOU student
Ginny Lang • Facilitator



GLOSSARY

Action item

A specific activity, with measurable outcomes, that is aligned with an initiative or strategic goal. Example: establish effective 2+2 transfer options for Oregon transfer students in the top 10 Western Oregon University transfer majors

Core themes

Outcomes that manifest essential elements of Western Oregon University's mission in support of Northwest Commission on Colleges and Universities accreditation

HECC

Higher Education Coordinating Commission

Metric

Measure of progress toward outcome. Example: number of pathways to graduation in 180 credits created by June 2017

Mission

The university's primary purpose and its reason for existence

National Survey of Student Engagement (NSSE)

Student engagement represents two critical features of collegiate quality. The first is the amount of time and effort students put into their studies and other educationally purposeful activities. The second is how the institution deploys its resources and organizes the curriculum and other learning opportunities to get students to participate in activities that decades of research studies show are linked to student learning.

wou.edu/institutionalresearch/additional-info

Outcome

Measurable results for progress toward a goal or strategic initiative. Example: number of transfer pathways created by June 2017

Purpose

What our university does for others how it affects the world around it

Strategic initiative

A project that is designed to help achieve an institutional priority (or goal). Example: streamline university requirements and academic pathways

Strategic priority

A key area of work for the university that forms the basis for action items and strategic initiatives

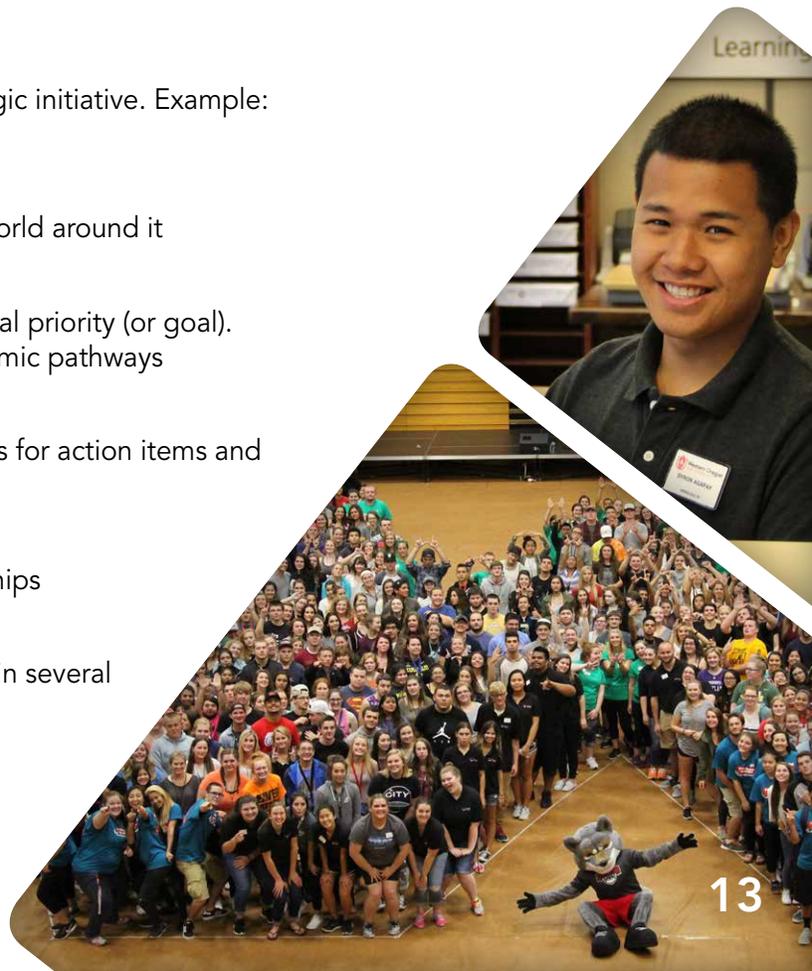
Values

Principles that guide the university's work and relationships

Vision

The desired future state to which our university aspires in several years' time

Source: *Strategic Planning in Higher Education*, Sherrie Tromp and Bren Ruben, NACUBO, 2004, pp. 39-41







Board of Trustees 2016-2017



JAIME ARREDONDO

*Secretary-Treasurer, Pineros Campesinos Unidos del Noroeste
(Oregon's Farmwork Union)*

Jaime Arredondo's first exposure to higher education was through his participation in Western Oregon University's Latino Mentor Program; graduating among the inaugural class at McKay High School. Arredondo serves as secretary-treasurer for Oregon's Farmworker Union and largest Latino organization, Pineros Campesinos Unidos del Noroeste (PCUN). In addition to these responsibilities, he serves Oregon's youth and families through his participation on the State of Oregon Youth Development Council, the Marion County Commission for Children and Families, Partners for Hunger-Free Oregon, and the Oregon Community Foundation Latino Partnership Project. A first-generation college student, Arredondo completed his bachelor's degree at Willamette University and is a graduate student at Oregon State University. Arredondo said, "Getting appointed to WOU's Board of Trustees would be an absolute privilege and opportunity. I've seen first-hand what an education at WOU can do for an individual, a family, and a community."



JAMES M. BAUMGARTNER

Attorney & Partner, Black Helderline LLP

James M. Baumgartner, alumnus of Western Oregon University, has been a trustee on the WOU Foundation Board since 2012, and is currently its chair. He served on the Executive Committee of the Oregon Consular Corps for five years, serving as dean in 2008, and was appointed as the Honorary Consul of Canada in Oregon in 2005. He continues a 28-year partnership with the law firm of Black Helderline LLP in Portland, serving as its managing partner from 2001-05. Baumgartner has also been nominated to the State Board of Higher Education, which for the remainder of this academic year will provide governance to the four technical and regional universities of Oregon. Baumgartner obtained a bachelor's degree from WOU and a J.D. from Willamette University College of Law



DR. REX FULLER

University President

Dr. Rex Fuller, president of Western Oregon University, joined the WOU community after serving as provost and vice president for academic affairs at Eastern Washington University (EWU) from 2011-2015. Prior to his service as provost, Fuller served as dean of EWU's College of Business and Public Administration and executive dean of EWU-Spokane, a shared campus with Washington State University. Before joining EWU, Fuller served as dean of business schools at Colorado State University and University of Wisconsin-La Crosse. He earned his B.A. in Public Administration from California State University-Chico and his Ph.D. in Economics from the University of Utah. Fuller said, "We are fortunate to have passionate alumni and community supporters of the university. Western has a well-established record of excellence and a long tradition of access, affordability, and student success. I look forward to working with WOU's Board to engage the campus and surrounding communities as we determine our path forward in the changing conditions that impact higher education in Oregon and the nation."



MARSHALL GUTHRIE
Director, Student Enrichment Program, WOU

Marshall Guthrie has served in higher education since 2003, joining WOU in 2010 and now serves as the director of WOU's Student Enrichment Program (TRIO-SSS). Guthrie participated on the WOU Staff Senate for two years, serving as president in 2011-12. Guthrie is involved in his community, having served as a Monmouth city councilor, chair of the City of Monmouth Budget Committee, the Monmouth representative of the WIMPEG (Public, Education, Government) Broadcast Committee, and co-chair of the Ford Family Pathways Project – a community group focused on collaboration between the three local communities: WOU, Monmouth and Independence. His passion to serve students who are first-generation, low income, or disabled, and achieve the dream of a college education is evident in the passion he demonstrates in his work at WOU. Guthrie obtained a bachelor's degree from University of Iowa and a master's degree from University of Central Missouri.



IVAN HURTADO
Underwriter, Farmers Insurance

Ivan Hurtado, a 2006 alumnus of Western Oregon University, earned a bachelor's degree with a double major in economics and international studies. He is a recipient of WOU's Student Enrichment Program Student of the Year award. Hurtado is an underwriter for Farmers Insurance and serves Oregon youth through a volunteer directorship of Hillsboro Young Life, which supports the students of Hillsboro and Century High Schools who are often from low-income and/or underrepresented families. He is also a board member of Grace Extended Ministries International.



GLORIA INGLE
Retired K-12 Educator; Councilmember for Confederated Tribes of Siletz

Gloria Ingle was raised on the reservation of the Confederated Tribes of Siletz Indians. Ingle completed a successful 30-year career in education, serving as both an elementary teacher and a K-12 principal receiving her special education and superintendent endorsements from the University of Alaska. She continues to serve the Confederated Tribes of Siletz as a council member and elder. With her expertise in education, she also contributes on curriculum review and accreditation committees. Ingle attended Western Oregon University before completing a degree from Sheldon Jackson College in Sitka, Alaska and a master's degree in educational leadership from the University of Alaska.



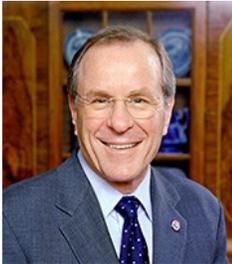
BETTY KOMP
Retired Oregon Legislator

Representative Betty Komp first became connected with Western Oregon University in her mid-30s when she was looking for a life change and decided to attend college. She transferred from Chemeketa Community College to WOU and earned a bachelor's degree in 1990. She began teaching at Woodburn High School and earned a master's to become an education administrator. Frustrated by federal education mandates, Komp decided to run for public office 12 years ago and won a seat in Oregon's House of Representatives. Komp joined WOU's Board of Trustees in January 2017 after retiring from her position in public office.



CECELIA KOONTZ
Business Manager, Central School District

Cecelia 'Cec' Koontz served WOU's Monmouth community as a city counselor 2010-2014, treasurer for the Monmouth-Independence Community Foundation, member of the Finance Committee of the Monmouth-Independence Chamber of Commerce, and is a panelist for the Oregon Arts Commission/Oregon Cultural Trust Grants programs. Koontz served on the Monmouth Economic Development Commission and as president for organizations such as the Pentacle Theatre and the Children's Education Theatre in Salem. In 2012, she was named the Monmouth-Independence Chamber of Commerce's First Citizen for her outstanding service to her community. Koontz serves as vice-chair for the WOU Board of Trustees and is the business manager for the Central School District and obtained a bachelor's degree in economics from the University of Puget Sound in Tacoma, Washington.



GOV. THEODORE KULONGOSKI
Oregon's Governor from 2003-2011

Theodore R. "Ted" Kulongoski is the only governor in Oregon history to have served in all three branches of state government. While in private law practice, Kulongoski was elected to the Oregon House of Representatives (1975-78) and the State Senate (1978-83). In 1987, he was appointed Oregon insurance commissioner. Elected Oregon attorney general in 1992, he reformed the state juvenile justice system and created the Oregon Youth Authority. In 1997, he was elected to the Oregon Supreme Court, where he served until mid-2001. He was inaugurated as governor of Oregon in 2003 and was reelected in 2006. Kulongoski understands what it is like for students who face adversity. He spent his childhood in a Catholic boys' home from a very young age. Following high school, he enlisted in the U.S. Marine Corps. Kulongoski later received a bachelor's degree and a law degree from the University of Missouri – Columbia. Kulongoski said, "My interest in WOU is a reflection of my interest in higher education generally, especially public institutions of higher education. The Quality Education Model and the 40-40-20 goal are important to Oregon's future. We need to keep both our large universities and our small ones affordable for working-class students if Oregon is going to meet its aspirations for future economic development. I'm a big believer in small colleges and universities. They can be centers of excellence. They can be welcoming places especially for students who are the first in their families to attend college. They can foster a 'thinking life.' WOU can do all of that and I am delighted to be part of it."



KELSEE MARTIN
Student, WOU

Kelsee Martin is pursuing a degree in exercise science at Western Oregon University with a minor in human biology, specifically focusing on pre-physical therapy. Her anticipated graduation date is June 2018. Martin is a member of the PLUS (Peer Leaders Understanding Students) Team at WOU and also enjoys participating in Western's Ambassador Program.



DR. JEANETTE MLADENOVIC
Executive Vice President and Provost, Oregon Health & Science University

Dr. Jeanette Mladenovic has 27 years of experience in academic administration, having held positions as chair of the Department of Medicine, dean for graduate and undergraduate medical education, faculty and hospital affiliations, and director of research education and career development. She currently serves as executive vice president and provost at Oregon Health & Science University. Nationally, she has served as a member of the Board of Directors for the American Board of Internal Medicine, the American Board of Medical Specialties, the Association of Professors of Medicine and its Board, the American Society of Hematology, and the Accreditation Council for Graduate Medical Education. Mladenovic said, "Western Oregon University is one of OHSU's nursing campuses, and as such, has provided me the opportunity to learn about the university's unique mission and programs. Its history of commitment to diverse communities of students makes it essential in the Oregon landscape of higher education. I would eagerly embrace the opportunity to participate in Western's future." Mladenovic obtained both her bachelor's degree and her medical degree from the University of Washington and earned a master's degree in business administration from the University of Miami, School of Business.



DR. CORNELIA PARASKEVAS
Professor of English, WOU

Dr. Cornelia Paraskevas, professor of English, has been teaching at WOU for over 25 years. During her tenure, she has served as department chair, faculty senator, member of the Western Oregon University Faculty Union (WOUFT) bargaining team, writing coordinator, and editor of accreditation reports (1996 and 2013). In addition to her teaching responsibilities, Paraskevas actively serves Salem-Keizer schools conducting writing and language workshops for K-12 grades. In the early 2000s she helped develop a unique four-year partnership with the Oregon Department of Education. Through this partnership, WOU students enrolled in writing and education courses were given the opportunity to score essays written by K-12 grade students as part of the Oregon State test. She co-wrote Western's dual-credit partnership document with the Hillsboro School District, in support of the state's 40-40-20 initiative. Paraskevas said, "I am honored to serve on the board of trustees for Western Oregon University. I believe that as an independent institution, we need to position ourselves as the Liberal Arts alternative to high-price private institutions. To ensure our success, we will need to balance the focus and interests of our students, our institution, our faculty, and our continued service to Oregonians." Paraskevas earned her doctoral degree in linguistics from the University of Kansas.



LANE SHETTERLY
Attorney & Partner, Shetterly Irick and Ozias

Lane Shetterly, alumnus of Western Oregon University, is a partner in the law firm Shetterly Irick and Ozias in Dallas, Ore. From 2004 through 2007, Shetterly was the director of the Oregon Department of Land Conservation and Development (DLCD). Prior to his appointment, Shetterly served seven years in the Oregon Legislature, serving as speaker pro tem of the House from 2001 until he resigned to become director of DLCD. He is chair of the Oregon Law Commission, a position he has held since 1998, and was appointed by the governor in 2005 to serve as a representative from Oregon on the National Conference of Commissioners on Uniform State Laws. During his first session in the legislature, he was privileged to be the chief sponsor of HB 2364, which established WOU as a university. In 2010, he received the Henry and Helen Graven Award for his contributions to community, church and society from Wartburg College, Iowa, past recipients of which include Robert F. Kennedy, Jr. and Greg Mortensen. He was awarded the Western Oregon University Alumni Award of Excellence in 2004. Shetterly earned a bachelor's degree in education from WOU and a JD from Northwestern School of Law. Shetterly said, "It is my honor and my pleasure to receive appointment to the new Western Oregon University Board of Trustees."



LOUIS C. TAYLOR
Senior Financial Officer, Taylor Wealth Management

Louis C. Taylor graduated with a degree in international business from WOU in 1998 and served his *alma mater* as a trustee on the WOU Foundation Board from 2000-10, acting as treasurer from 2007-09. He is an active member of the WOU Football Alumni Association and established the Louis Taylor Football Scholarship in 2004. Taylor was also selected as All American Athlete during his time at WOU. Beginning his career in finance with a private Wall Street based firm in Beaverton, Ore., and moving to Crown Capital Securities, L.P., serving as an independent financial advisor, in 2010, he formed Taylor Wealth Management where he currently serves as a senior financial advisor. He is also co-founder and chief operations officer for Zon Compounding, LLC. Taylor said, "WOU has played an instrumental part of my success in life. It was and is a university that gives individuals hope at furthering their education. My board experience speaks for itself; and the fact that WOU has been granted independent status makes me want to be an instrumental part of the new board, shaping the future of an institution that has shaped mine."



Appendix C

OVERVIEW: STUDENT SUCCESS AND COMPLETION MODEL

CHARGE:

ORS 350.075(3)(iii)(f):

3) The Higher Education Coordinating Commission shall:

f) Adopt rules governing the distribution of appropriations from the Legislative Assembly to community colleges, public universities listed in ORS 352.002 and student access programs. These rules must be based on allocation formulas developed in consultation with the state’s community colleges and public universities, as appropriate.

DEVELOPMENT:

- Oregon’s Higher Education Coordinating Commission (HECC) articulated the following principles to guide the workgroup’s efforts in developing a revised funding allocation system. These principles stipulated that the funding allocation designed by the workgroup would:
 - Reflect HECC’s strategic plan and OEIB Equity Lens
 - Focus on student access and success with an emphasis on underrepresented populations
 - Encourage high demand/high reward degrees
 - Recognize/reward differentiation in institutional mission and scope
 - Use clearly defined, currently available data
 - Maintain clarity and simplicity
 - Utilize a phase-in period to ensure stability, beginning with 2015-17 biennium
- The HECC convened a workgroup comprised of senior financial, academic, and student affairs administrators from each of the seven public universities as well as faculty and student leadership in June 2014 to develop an outcomes-based funding model to allocate the Public University Support Fund (PUSF).
- The workgroup, supported by HECC staff and consultants with HCM Strategists, examined outcomes-based funding models, reviewed relevant literature and best practices from other states to inform the creation of a model that meets the objectives articulated by the HECC and Oregon’s unique institutional context.
- The iterative development process concluded in February 2015 with the creation of the Student Success and Completions Model (SSCM). The HECC approved administrative rules in April 2015 which operationalized the SSCM for implementation during the 2016 fiscal year.
- In July 2015, the SSCM was utilized to allocate a significant re-investment in the PUSF to the public universities, resulting in increased funding for each university. This marked the beginning of a four-year SSCM phase in period that will conclude in the 2019-20 fiscal year.

FRAMEWORK:

The SSCM is comprised of three funding categories:

- **Mission Differentiation (MD) Funding** supports the unique regional, research and public service missions and activities of each university, as “line item” funding for services, programs or general operations.
- **Activity-Based Funding** distributes resources based on student credit hour (SCH) completions of Oregon resident students at undergraduate and graduate levels.
- **Completion Funding** rewards degree and certificate completions by Oregon resident students. Completions by underrepresented students (underrepresented minority, low-income, rural and veteran status) and those in academic disciplines in high-demand and high-reward fields (STEM, Health, Bilingual Education) are provided additional weighting in the allocation formula.

MODEL:

Funding Category	Data	Calculation
Mission Differentiation Funding	<ul style="list-style-type: none"> • Historical funding levels for MD items • Dual Credit completions 	<ul style="list-style-type: none"> • Allocation is “off the top” • Based on historical funding levels adjusted for inflation • Includes new line item funding related to governance transition, funding model and definitional changes • Includes resources for Dual Credit completions

Funding Category	Data	Calculation
Activity-Based Funding ¹	<ul style="list-style-type: none"> SCH completions by CIP code (program area) and student level 	<ul style="list-style-type: none"> A defined percentage of non-MD funding is distributed for SCH completions (40% of non-MD funding at full implementation) Distributes resources based on SCH completions at each institution utilizing program- and course level-specific cost weighting system
Completion Funding ¹	<ul style="list-style-type: none"> Degree and graduate certificate completions by level and CIP code Completions by transfer status (BA/BS only) Completions by underrepresented students <ul style="list-style-type: none"> Low income student (Pell Grant recipient) Underrepresented minority student Rural student Veteran student Completions in priority degree areas <ul style="list-style-type: none"> STEM Healthcare Bilingual Education 	<ul style="list-style-type: none"> Degrees at all levels are funded: BA/BS through PhDs², including graduate certificates Cost-weighting adjustments are made to reflect program duration and type (CIP code) Additional weighting awarded for BA/BS degrees earned by underrepresented students and degrees in high-demand and high-reward areas Allocations for transfer students are discounted relative to non-transfer students

¹All data is three-year rolling average. ² PhDs awarded to non-resident students are treated as resident students.

TRANSITION:

Three mechanisms are used to smooth the transition from the prior funding system to the SSCM:

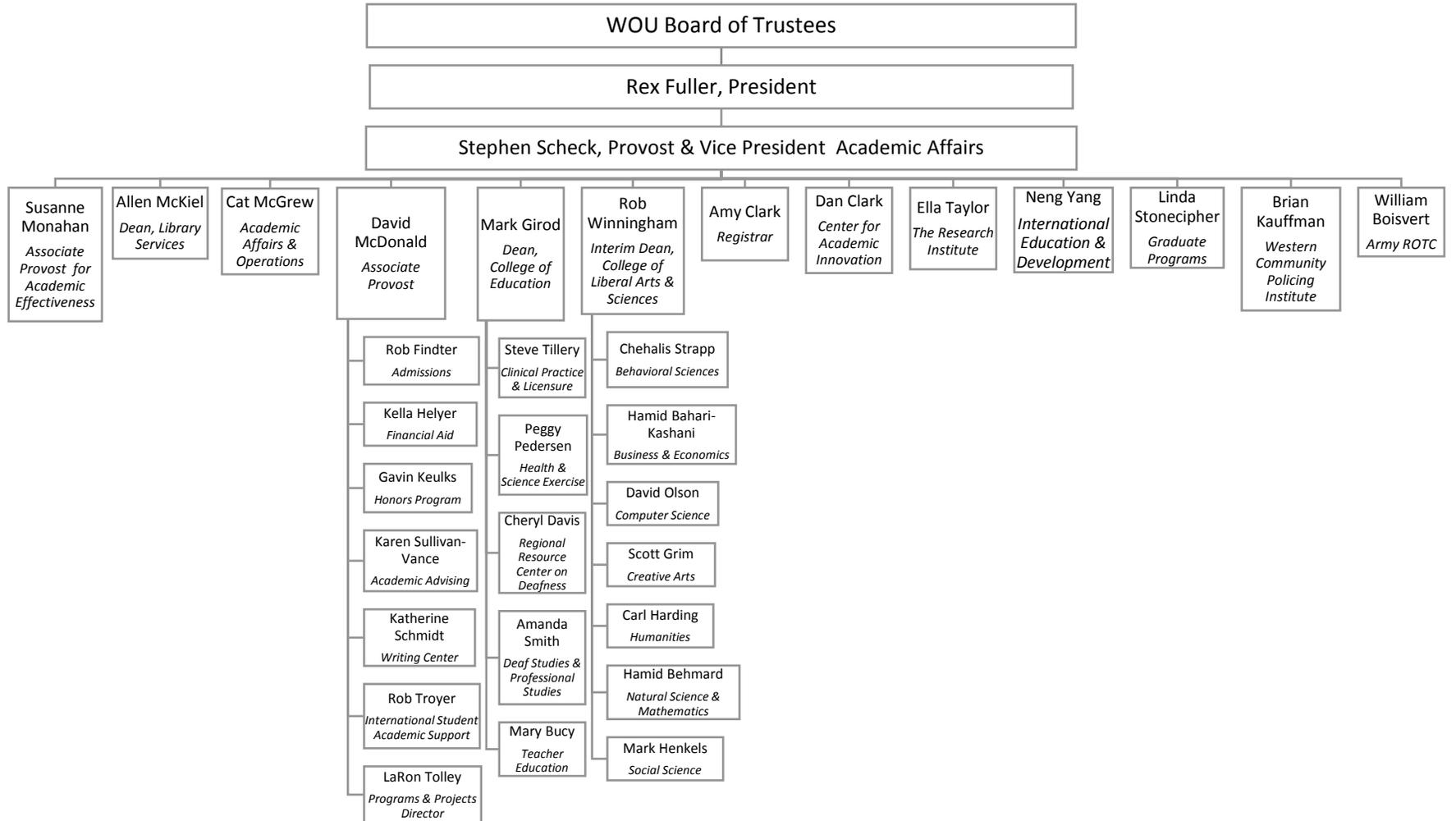
- Stop Loss** – The Stop Loss mechanism prevents any institution from receiving less in current year allocations than a pre-determined percentage of the prior year. The Stop Loss threshold declines after the first year until it is disengaged after year four.
- Stop Gain** – The Stop Gain mechanism prevents any institution from receiving more in current year allocations than a pre-determined percentage increase from the prior year. The Stop Gain threshold increases after the first year until it is disengaged after year four.
- Phase In** – During the first year 20% of all non-Mission Differentiation or formula driven allocations are based on degree and certificate completions. Completion Funding increases by 20 percentage points for each the subsequent two years until it accounts for 60% of all non-Mission Differentiation funding, at which point it remains stable.

FUTURE:

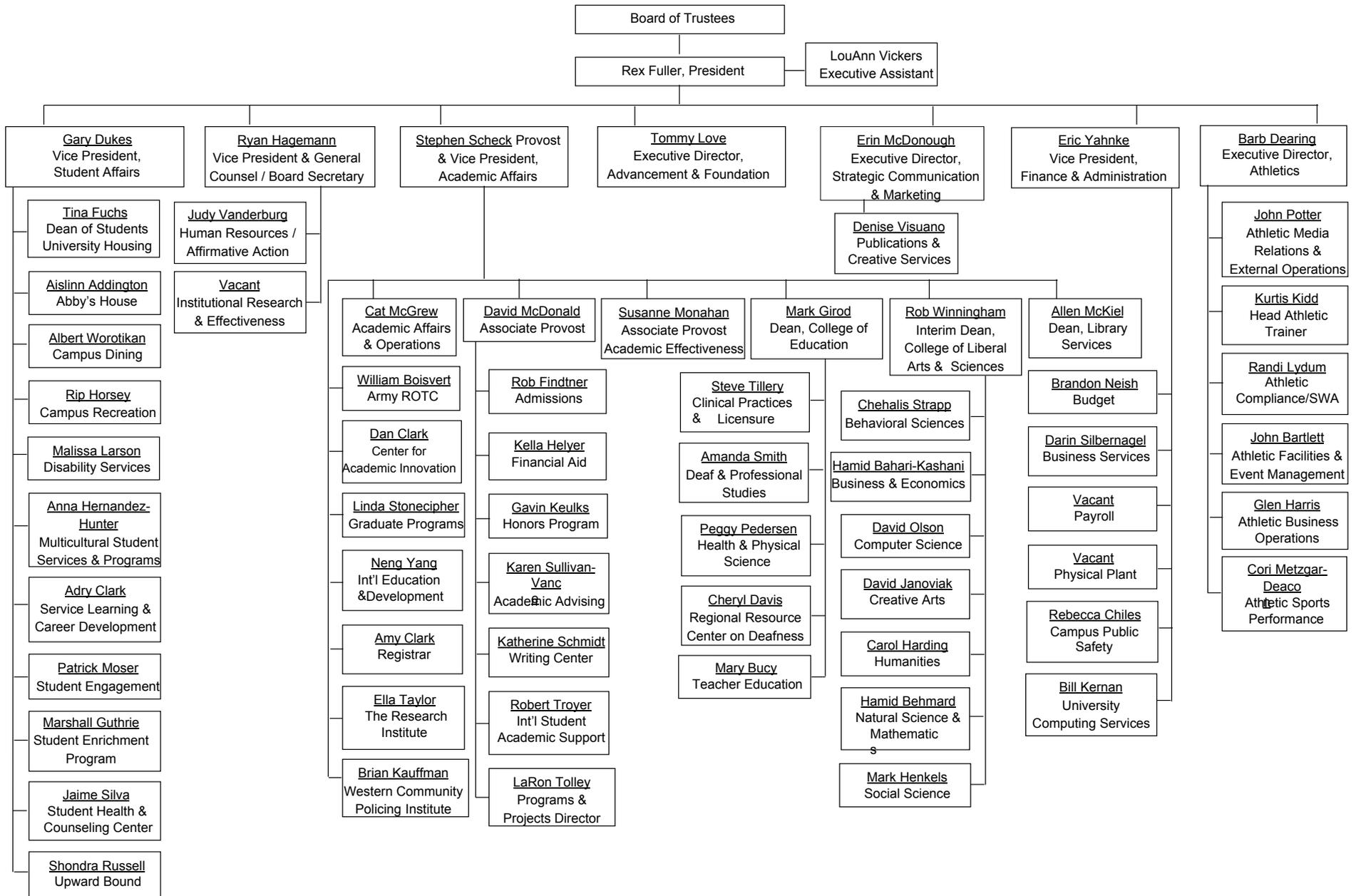
- Two Year Review** – Review and revision of definitions, weighting factors and items of a technical nature within the SSCM will be undertaken to adjust for minor definitional or weighting issues, should any arise.
- Six Year Review** – A comprehensive review will be conducted with stakeholders to ensure the SSCM continues to appropriately align state funding with state priorities and the evolving institutional context.
- Evaluation** – HECC will conduct yearly reviews focusing on the academic quality, productivity and financial integrity of the public universities.

STUDENT SUCCESS AND COMPLETION MODEL DISTRIBUTION						
		Non-SSCM	SSCM			
		2015	2016	2017	2018	2019
Funding Levels	Mission Differentiation	\$35.3 million	\$54.8 million	\$62.2 million	\$63.6 million	\$65.1 million
	Activity-based	\$206.9 million	\$195.6 million	\$153.8 million	\$115.4 million	\$120.6 million
	Completions	\$3.5 million	\$48.9 million	\$102.6 million	\$173.2 million	\$180.9 million
Completion Payments	Avg. Degree Completion	\$114	\$2,500	\$5,307	\$9,018	\$9,423
	Avg. Underrepresented Support	\$526	\$777	\$1,641	\$2,754	\$2,878
	Avg. Student Credit Hour	\$79.18	\$77.34	\$61.88	\$46.85	\$48.95
Notes	Funding assumes PUSF growth at OEA Oregon Economic and Revenue Forecast (Feb. 2016) general fund growth rates and constant SCH/Completion performance. 2015 Underrepresented Support includes only underrepresented minority and rural students. Tuition offset funding and Technical and Regional University Shared Services funding excluded from all calculations.					

Appendix D



Appendix E



**Western Oregon University
Alignment of Budgeting and Planning**

Introduction

The budgeting process at WOU is designed to enhance the university's ability to meet changing institutional needs, while supporting its historical mission. Budget decisions should be strongly linked to the University's *2017-2023 Strategic Plan*, which will be presented to the Board of Trustees at the January 25, 2017 meeting. Once approved, a crucial step in implementation of the plan is to align budget decisions with the goals and objectives of the strategic plan.

Once complete, the process will also support the NWCCU accreditation standards which expect the following:

2.F.3 The institution clearly defines and follows its policies, guidelines, and processes for financial planning and budget development that include appropriate opportunities for participation by its constituencies.

Standard Three – Planning and Implementation

The institution engages in ongoing, participatory planning that provides direction for the institution and leads to the achievement of the intended outcomes of its programs and services, accomplishment of its core themes, and fulfillment of its mission. The resulting plans reflect the interdependent nature of the institution's operations, functions, and resources. The institution demonstrates that the plans are implemented and are evident in the relevant activities of its programs and services, the adequacy of its resource allocation, and the effective application of institutional capacity. In addition, the institution demonstrates that its planning and implementation processes are sufficiently flexible so that the institution is able to address unexpected circumstances that have the potential to impact the institution's ability to accomplish its core theme objectives and to fulfill its mission.

In the past, the budget process has been largely incremental¹ with some limited funding tied to special initiatives and enrollment. While this approach may have served the university well in times of increasing funding, it does not allow for sufficient flexibility in times of stable or declining enrollments and funding.

For the foreseeable future, Western will be facing increased competition for enrollment in the coming years and our recent enrollment patterns show declining enrollment. This trend, coupled with a performance-based budget process from HECC, places additional fiscal pressure on the university. In such an environment, the campus must develop a resource allocation process that enables it to support

¹ Incremental budgeting takes existing base budget and makes minor adjustments to the budget from the previous year and does not examine the extent to which the budget is linked to the goals and/or strategic directions of the university.

its ongoing functions and activities **and** to reallocate resources to support expanded activities and new initiatives.

Budget Process

In order to achieve greater budget and planning alignment, Western will adopt a budgeting process that will expect each budget unit² to review its existing budget for continuation and support of its ongoing activities and responsibilities, and to develop new initiatives that must be aligned with the *Strategic Plan*.

Additionally, each budget unit will also consider any needed internal reallocation that improves outcomes and/or performance. Depending on state-wide economic conditions and likely levels of state funding, each budget unit will be expected to develop scenarios based on increased funding or decreased funding. In years where the allocation from the state and/or enrollment/tuition forecasts are clear, only one scenario may be needed.

The principal advantages of this approach are:

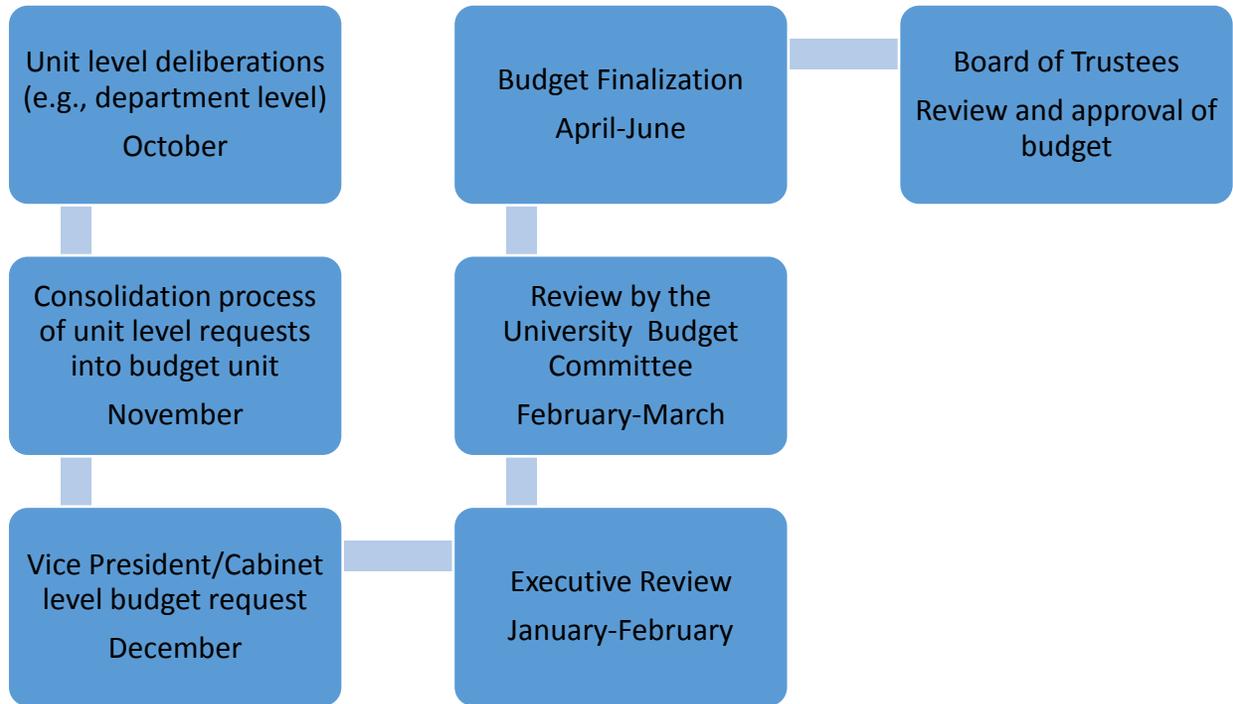
- it allows for reallocation of funding and personnel to support key initiatives, both new and continuing,
- it curbs “mission creep” by re-evaluating past budgeting commitments and requires justification of spending in accord with the University *Strategic Plan*,
- it responds to changing circumstances, and
- it allows for a direct link between budgeting and the *Strategic Plan*.

Further, this approach provides for campus and community input by:

- reviewing university *Strategic Plan* and key initiatives with campus community
- identifying funding priorities for policy based funding
- establishing and communicating timelines for budget process
- providing a consistent approach to making budget decisions
- establishing budget priorities that can be vetted by the campus prior to submission of budgets to the Board of Trustees for final review

² Budget units include: Academic Affairs, Advancement/Foundation, Athletics, Business and Finance, General Counsel/BOT, and Student Affairs. The budget process in academic affairs will be developed to ensure that academic divisions play an active role in developing the budgets for each college.

Overview and Expected timeline for the Budget Process



University Budget Committee

The University Budget Committee (UBC) will be an advisory group consisting of representation from faculty, classified staff, unclassified exempt staff, students and administrators. This body is advisory to the President and all members shall be appointed by the President based on recommendations from appropriate constituencies. The UBC will make recommendations to the President prior to finalizing budget recommendations from the President to the Board of Trustees. Final funding recommendations are expected to have clear linkages to the University's *Strategic Plan*.

Following executive review, the University Budget Committee will review budget proposals and make recommendation to the President. The UBC will consider the university's proposal in relation to the university's overall financial condition. Factors such as enrollment, tuition, financial aid, changes in state and federal legislation and policy will be important matters affecting final deliberations of the UBC.

While committee members are drawn from various constituencies, they are expected to apply a university-wide perspective to the budget deliberations and recommendations. The committee will be chaired by the Vice President for Finance and Administration who will have no voting rights. The UBC

will have support from staff within Finance and Administration to complete its work. For example, Finance and Administration will maintain minutes and official records of final recommendations.

Voting members of the UBC will serve two year terms. Initial appointments will be made to either one-year or two-year positions to allow for experience and continuity.

- Four faculty members recommended by the Faculty Senate Executive Committee
- Three classified staff members recommended by the Staff Senate Executive Committee
- Two students recommended by ASWOU's Executive Committee
- Two unclassified exempt staff members recommended by the Administrative Services Council
- One representative from each of the Vice Presidential divisions recommended by the respective Vice President: Academic Affairs, Finance and Administration, General Counsel and Administration, and Student Affairs
- One representative from Intercollegiate Athletics
- One additional member appointed by the President

Summary

This approach to budgeting is designed to enable the University to align its financial resources with its mission, vision and values. In doing so, budgets will be better able to meet changing institutional needs and be responsive to our historical mission as well as new opportunities. The success of the model will depend, to a great extent, on the degree to which the budgeting process allows for campus-wide dialog and participation and the degree to which decisions related to new resources and reallocation of existing resources are linked to the agreed upon strategic directions of the university.