



**SPECIAL MEETING OF THE BOARD OF TRUSTEES  
ANNUAL PLANNING SESSION**

**Meetings No. 12 & 13**

**March 10 – 11, 2016**

**Salem Convention Center, Board Room**

**AGENDA**

**THURSDAY, MARCH 10, 2016**

**(1) CALL-TO-MEETING/ROLL CALL**

**(2) EXECUTIVE SESSION**

The board will meet in an executive session pursuant to ORS 192.660(2)(i) in order to discuss President Rex Fuller's self-assessment and progress report.

**(3) ADJOURNMENT**

**FRIDAY, MARCH 11, 2016**

**(1) CALL-TO-MEETING/ROLL CALL**

**(2) CHAIR'S WELCOME**

**(3) LEGISLATIVE UPDATE**

*a) Discussion Item: first read FY17 budget*

*b) Discussion Item: first read 2016-2017 tuition range 3-5%*

**(4) NWCCU UPDATE**

**(5) ENROLLMENT MANAGEMENT/HECC FUNDING**

**(6) EXERCISE: PEST/SWOT**

**(7) STRATEGIC PLANNING PROCESS**

**(8) BOARD DISCUSSION: Planning session summary**

**(9) ADJOURNMENT**

## Board of Trustees, March 11, 2016

### President's Report—Higher Education Landscape

As Western Oregon University develops its strategic plan, it is important to consider WOU's role in improving educational outcome for Oregonians. The HECC draft Strategic Plan (Resource P-1) vision states:

The Higher Education Coordinating Commission (HECC) is dedicated to fostering and sustaining high quality, rewarding pathways to opportunity and success for all Oregonians through an accessible, affordable and coordinated network for educational achievement beyond high school. (p. 1, HECC Strategic Plan: 2016-2020 February 11, 2016 working draft)

The Strategic Plan is designed to improve educational attainment and move Oregon closer to the goals outlined in the original charge by Governor Kulongoski known as “40-40-20”. The HECC plan focuses on: “... three primary aspirations for Oregon higher education: (1) improving **educational attainment and completion**, (2) improving Oregon's **economic competitiveness and quality of life**; and (3) ensuring that resident students have **affordable access** to colleges and universities.” (**emphasis added**) (p. 3, HECC Strategic Plan: 2016-2020 February 11, 2016 working draft)

The higher education landscape for public comprehensive universities has changed significantly in recent years. Foremost among the changes are changes in the share of revenue that is derived from tuition vis-à-vis other revenue sources. The recession of 2008 resulted in large increases in tuition to offset state funding cuts. Oregon was among the states to cut higher education the most. In the past budget cycle, Oregon has added state funding and leads the nation in percentage increase in funding. Yet, despite this recent investment, state funding per student in Oregon remains among the lowest in the nation. As we prepare for the 2017-19 biennium, state funding increases are unlikely and we can expect to see greater upward pressure on tuition.

### National Trends

The following excerpts provide a context for Oregon in light of national trends:

- Highlights from HECC, *House Bill 2973: January 2016 Interim Report*, Resource P-2
  1. Inflation adjusted tuition in Oregon increased by over 30% in 2007-15 and Oregon's increase was the 18<sup>th</sup> highest

2. Oregon median income is \$10,000 below national average, while public tuition is above the national average
  3. Higher tuition also leads to lower credits/term and longer time to degree
  4. Pell grants covered two-thirds of public tuition in the 1970's, today the grants cover about 25%
  5. IPEDS data for WOU—the average Pell grant in 2104-15 was \$4087, tuition and fees were over \$10,000 and total cost of attendance was over \$20,000
- Highlights from American Council on Education, *Education Deserts: The Continued Significance of “Place” in the Twenty-First Century*, 2016, Resource P-3
    1. Researchers have found that some students are more responsive to distance than to price (Alm and Winters 2009; Cooke and Boyle 2011; Rouse 1995). Students who are more affluent are less affected by distance, while students from working-class families and students of color are most affected by distance (Kohn, Manski, and Mundel 1976; Ovink and Kalogrides 2015).
    2. Average distance from home for 4-year publics is 82 miles and the median is 18 miles→this suggests that the populations centers of the I-5 corridor are within range
    3. Because of family responsibilities, cultural norms, or factors related to working while enrolled in school, many students stay close to home for college (Somers et al. 2006; Perna 2010). Furthermore, Latino, black, and Native American students are more likely to stay closer to home for these reasons (Hurtado, Inkelas, Briggs, and Rhee 1997; McDonough, Antonio, and Trent, 1997; Pérez and McDonough 2008). In addition, rural students tend to stay closer to home or limit their choices due to community ties (Ali and Saunders 2009; Byun, Meece, and Irvin 2012).
  - Highlights from American Association of State College and Universities (AASCU), *Managing Your Enrollment Destiny*, Resource P-4
    1. 1<sup>st</sup> year enrollment growth in 2002-07 was 5% per year compared to 1.3% in 2007-12; and the percent of schools with declining 1<sup>st</sup> year enrollment increased from 33% to 48%
    2. Greatest increase in HS graduates nationally is Hispanic (+46%), yet this population comes from families with incomes that are over \$10,000 **below** the national average→importance of affordability through Pell and institutional aid
    3. Average yield rates are falling→need to admit more students to yield the same number of enrolled students, which in turn drives recruitment costs higher

4. Improve retention and graduation by focusing on the middle years and taking steps to ensure that students finish
  5. A focus on the “murky middle” will also enhance degree completion, which, in turn, has a positive effect on the performance funding model.
- AACSU, *Top Ten Higher Education State Policy Issues for 2016*, Resource P-5
    1. Keeping higher education affordable:
      - With mounting public alarm over the growth of tuition rates and student debt burdens, state lawmakers will likely continue to negotiate tuition freezes or tuition increase caps with higher education officials in exchange for funding increases—or, at the very least, a promise not to reduce funding. State lawmakers will also explore other avenues to ease the burden of college costs, such as increasing financial aid and reducing textbook costs.
      - Due to these factors, higher education funding in 2016 could resemble 2015: modest funding increases in most states, with cuts in states that are pursuing austerity policies and those reliant on severance taxes from oil and gas.
    2. Improving educational outcomes and degree production:
      - This year will likely witness continued state emphasis on institutional outcomes and accountability measures, including progress on improving graduation rates and boosting overall degree production.
      - According to the National Conference of State Legislatures (NCSL), 32 states now have performance based funding in place for all or a portion of state higher education funding, and five states are currently in transition to such models
    3. Combating sexual assault:
      - State legislatures, in particular, are rapidly seeking to address this issue, as over 26 states considered legislation in 2015, up from six in 2014.
      - This year will likely see an even greater number of proposals across the nation as state lawmakers continue to work with college campuses to prevent campus sexual assault, develop protocols to effectively respond to and report incidents, and ensure disciplinary proceedings are equitable and timely
    4. Meeting state economic needs through higher education:
      - Over the last several years, governors have promoted and expanded policies that link programs in high schools, technical colleges and universities directly to in-demand, high-paying opportunities in the state workforce. In addition, commercializing university research, facilitating

public-private partnerships, attracting top-tier researchers, and emphasizing STEM education all have been themes of governors in recent years, a trend that will likely continue this year.

5. Aligning secondary-postsecondary educational standards:
  - the Common Core State Standards (CCSS)—which are intended to ensure high school graduates are college and career ready, reduce the number of students needing developmental or remedial coursework, and improve college graduation rates
6. Access for undocumented students:
  - In 2016, there will likely be continued attempts to either expand or restrict college access for undocumented students.
7. Guns on campus
  - Lawmakers this year will continue to debate bills that would force public colleges and universities to allow individuals with concealed weapons permits to carry their weapons on campus
8. College access and success for veterans:
  - This year will likely bring more state legislation to help veterans achieve their college goals and facilitate their transition into the civilian workforce.
9. Free community college:
  - In 2015, lawmakers in Oregon and Minnesota approved different variations of free community college plans. President Obama championed a federal proposal inspired by the Tennessee Promise, but the legislation has not gained sufficient support on Capitol Hill.
  - Some state-level free community college plans are “last-dollar” programs that pay for tuition costs that are not covered by existing state and federal financial aid programs. Because federal and state financial aid already covers tuition costs for many low-income students, the last-dollar scholarship programs will disproportionately direct state resources towards students from higher income backgrounds.
10. Student loan refinancing and debt assistance
  - As college debt affects more state residents, state policymakers will continue to explore policies to ease debt burdens in the months and years ahead.
11. Additional items: dual enrollment—such as the Willamette Promise

## State Trends and Issues

- Summary of legislative days and Council of Presidents
  1. Increased minimum wage: Polk County is in tier 2 with new wage of \$9.75/hr. effective July 1, 2016 and \$11.25 by end of the 2017-19 biennium. Expected cost to WOU is over \$500,000 and expected to grow to over \$1M by the end of 2019-21 when the minimum wage will be \$12.75/hr.
  2. Current Service Level (CSL) funding is around 3% and universities need about 8% to account for PERS and rising health care, this leads to a funding gap that will be dependent on tuition setting authority
  3. Legislators expect a shortfall of over \$1 billion in 2017-19
  4. FSLA changes to raise threshold for exemption for overtime from \$23,660 to \$50,440—this will affect over 100 employees at WOU
  5. ECONorthwest estimated that if the educational gap for underrepresented groups had been closed in 2003, state GDP would be between \$1.9 billion and \$3.3 billion higher.
  6. HECC planning scenarios assumptions include a limit of 3% tuition, a range of CSL from 3-7.8%, and base funding of -10%, flat and +10%
  7. Creation of OSU-Cascades (a 5,000 liberal arts campus) and its effect on enrollment completion and competition for capital funds
- Results from HECC employment forecasts through 2017, Resource P-6
  1. Employment in jobs that require a bachelor’s degree or higher are expected to increase from 475,000 to over 500,000—an increase of 7% from 2012 to 2017
  2. Figure 3 and 4 show the largest numbers of openings and the largest number of high-wage openings. Comparing these occupations to WOU’s academic array shows areas of alignment such as teacher education, business, and information systems.

<b>Figure 3: Occupations requiring at a bachelors’ degree with the <i>most projected openings</i></b>		
<b>Occupation</b>	<b>Total Openings 2012-2017</b>	<b>Competitive Education Level</b>
Registered Nurses	4787	Bachelor's
General and Operations Managers	3470	Bachelor's
Accountants and Auditors	2662	Bachelor's
Postsecondary Teachers, Except Graduate Teaching Assistants	2556	Advanced
Elementary School Teachers, Except Special Education	1949	Advanced
Secondary School Teachers, Except Special Ed./Technical Ed.	1848	Advanced

**Figure 3. Occupations requiring at a bachelors' degree with the *most projected openings***  
(continued)

Physicians and Surgeons	1794	Advanced
Business Operations Specialists, All Other	1747	Bachelor's
Computer User Support Specialists	1459	Bachelor's

**Figure 4. *High-wage/high-demand* occupations requiring at least postsecondary training**

<b>Occupation</b>	<b>Total openings 2012-2017</b>	<b>Competitive education level</b>
General and Operations Managers	3470	Bachelor's
Accountants and Auditors	2662	Bachelor's
Physicians and Surgeons	1794	Advanced
Computer Systems Analysts	973	Bachelor's
Cost Estimators	879	Bachelor's
Computer Occupations, All Other	800	Bachelor's
Sales Managers	715	Bachelor's
Pharmacists	704	Advanced
Medical and Health Services Managers	661	Advanced
Industrial Engineers	656	Advanced
Computer Hardware Engineers	621	Advanced
Marketing Managers	604	Bachelor's
Construction Managers	600	Bachelor's
Physical Therapists	591	Advanced
Librarians	317	Advanced
Medical and Clinical Laboratory Technologists	297	Bachelor's
Veterinarians	272	Advanced
Urban and Regional Planners	268	Advanced

Source: ECONorthwest analysis of Oregon Employment Data.

- A key takeaway from Figure 3 and 4 is that WOU offer degrees in several of the high demand fields: nursing, teacher education, business, and information systems

- Enrollment Trends

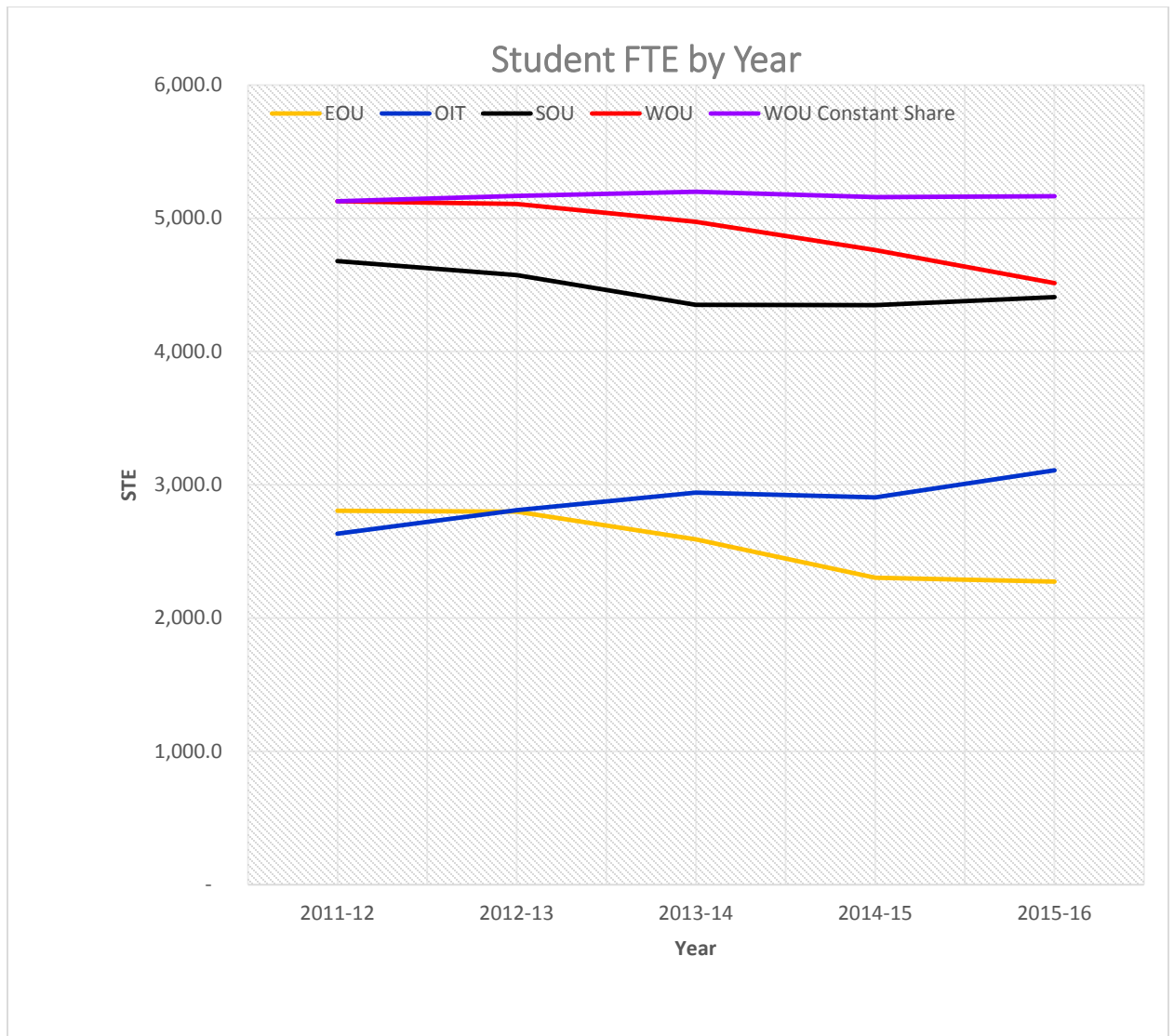
**Total Fall Headcount and FTE Enrollment, 2015 Compared to 2014**  
(Fall 4th week)

	Fall 2015		Fall 2014		Headcount Change		FTE Change	
	Headcount	FTE	Headcount	FTE	Number	Percent	Number	Percent
Eastern Oregon University	3,488	2,274	3,653	2,392	-165	-4.5	-118	-4.9
Oregon Institute of Technology	4,786	3,108	4,273	2,905	513	12.0	203	7.0
Oregon State University - Corvallis	29,576	25,275	28,886	24,886	690	2.4	389	1.6
Oregon State University - Cascades	1,016	604	980	546	36	3.7	58	10.6
Portland State University	28,076	20,162	28,241	20,215	-165	-0.6	-53	-0.3
Southern Oregon University	6,215	4,408	6,203	4,347	12	0.2	60	1.4
University of Oregon	24,125	22,598	24,181	22,832	-56	-0.2	-234	-1.0
Western Oregon University	5,445	4,513	6,058	4,761	-613	-10.1	-247	-5.2
<b>Total</b>	<b>102,727</b>	<b>82,941</b>	<b>102,475</b>	<b>82,883</b>	<b>252</b>	<b>0.2</b>	<b>58</b>	<b>0.1</b>

Source: HECC Office of Research and Data, 11/13/2015.

- New campuses: Increased competition for new freshmen—new campus at OSU—Cascades, OSU-Newport (?), and small increase in the HS class in Oregon ~34,000 per year
- The following chart and table shows the FTE among the TRU's vis-à-vis total OUS enrollment. The pattern shows that WOU's share of enrollment is decreasing compared to other four-year campuses.
- The chart and table also includes results assuming that WOU had maintained its share of total OUS enrollment—market share constant. As noted, ***if WOU had maintained its share of OUS enrollment, FTE would have been 5,166.0 in 2015-16 compared to its actual level of 4,513.3.***
- This difference of 652.7 FTE would have generated over \$4 million in additional tuition and fees. Moreover, the higher level of enrollment would increase the likelihood that the number of graduates would be higher and improve our financial situation in relation to the performance funding model (SSCM).





Student FTE	2011-12	2012-13	2013-14	2014-15	2015-16
EOU	2,804.8	2,799.8	2,592.2	2,303.5	2,273.8
OIT	2,632.6	2,809.1	2,941.0	2,905.4	3,108.3
SOU	4,677.7	4,573.2	4,350.6	4,347.2	4,407.5
WOU	5,126.7	5,106.1	4,973.9	4,760.5	4,513.3
WOU Constant Share	5,126.7	5,166.8	5,199.8	5,159.3	5,166.0
OUS	82,309.1	82,952.6	83,483.0	82,833.0	82,940.7

- HS trends: The National Center for Education Statistics projects that the number of HS graduates for Oregon will remain flat over the period until 2021 and HECC projects that share of HS graduates will remain flat into the 2030's while the share of HS graduates from underrepresented groups will increase to nearly 40% of the total.
- WOU's success with unrepresented students is an advantage, but additional pipelines need to be created with HS throughout the state—the Willamette Promise is an advantages that could build stronger ties.
- Community Colleges: Access to community colleges is likely to increase through the Oregon Promise and WOU will need to strengthen its connections to CCs for the purpose of transfer. Tennessee's experience was that the free tuition increased enrollment but has not increased degree attainment at the 2-year level. Oregon and Tennessee's programs help low-income students the least because they pay for college for all students and the grants are "last dollar in", so students with Pell grants receive a smaller dollar amount than non-Pell students. A key for WOU will be to position itself as the transfer school of choice for CC students.
- Tuition: As tuition increases, enrollment from low-income students/families will depend on financial aid that will need to include greater support from scholarships in junior and senior years
- The following table shows tuition at comparison schools in Oregon. WOU's traditional tuition is 3<sup>rd</sup> highest behind UO and OSU. SAT scores of WOU applicants are also sent to other Oregon schools, which is an indicator of how students view us in the market. The overlaps in order of magnitude are:
  - Oregon State (907)
  - U Oregon (630)
  - Portland State (503)
  - Southern Oregon (370)
  - University of Portland (241)
  - Linfield (240)

<b>Resident Tuition at Comparison Schools</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>% Chng 2012-13 to 2015-16</b>
<b>UO</b>	9309	9672	9918	10287	10.5%
<b>WOU (Promise)</b>	8529	8994	9168	9369	9.8%
<b>OSU</b>	8139	8250	9122	9059	11.3%
<b>WOU (Traditional)</b>	7989	8204	8277	8433	5.6%
<b>SOU</b>	7521	7701	7719	8145	8.3%
<b>PSU</b>	7653	7788	7794	8034	5.0%
<b>Chemeketa CC</b>	3915	4050	4230	4230	8.0%

## Summary

The upcoming strategic planning process will afford WOU an opportunity to clearly delineate its role in the new higher education landscape of Oregon. Our legacy of student access and success have positioned WOU for continued success, but more attention needs to be paid to retention in order to achieve a higher success rate for all students.

Moreover, Western will need to expand paths of opportunity for an increasingly diverse high school graduating class. Additionally, Western can lead the way in providing Oregonians access to a four-year institution after attending community college. WOU should also consider ways to reengage adults who have “some college but no degree” in pathways to earn a bachelor’s degree. For example, with our proximity to Salem, WOU could develop partnerships with state agencies to offer professional master’s degrees in selected fields that serve state needs. Such programs will afford students an opportunity for professional development and career advancement. Finally, WOU must consider its tuition position to ensure that access is match with affordability to create opportunities for Oregonians. The results of the planning process will be critical as WOU develops and implements an enrollment management plan that strategically considers the enrollment mix (undergraduate/graduate, resident, WUE, non-resident US, and international) and the tuition mix (Western Promise, undergraduate and graduate) to ensure fiscal sustainability.

## Resources

- P-1 HECC, *Strategic Plan: 2016-2020 February 11, 2016 working draft*
- P-2 HECC, *House Bill 2973: January 2016 Interim Report*
- P-3 American Council on Education, *Education Deserts: The Continued Significance of “Place” in the Twenty-First Century*
- P-4 Highlights from American Association of State College and Universities (AASCU), *Managing Your Enrollment Destiny*
- P-5 AACSU, *Top Ten Higher Education State Policy Issues for 2016*
- P-6 ECONorthwest, *HECC Targets through 2017*

## **Introduction**

In the 2015 legislative session, the universities successfully advocated for a substantial increase in state appropriation, particularly compared to the previous biennium. Although the universities' request was for \$755M—which would have returned the universities to pre-recession, 2007 budget levels—the universities received \$700M from the 2015 Legislative Assembly. Since that time, significant changes in cost drivers have challenged legislators and decision-makers as the state worked through the short legislative session in February 2016 and prepared for the 2017 legislative session. This memorandum outlines some of those challenges through a university lens and sets the stage for what strategies the universities and Western Oregon University in particular might face as it charts a strategic course for the 2017-2019 biennium and beyond. Before identifying several topics, this memorandum includes a brief timeline that stretches from April 2016 to April 2017, highlighting political, economic, and governance points over the course of the next twelve months.

## **Timeline**

- (1) *April 1, 2016*: University's budget request is due to the Higher Education Coordinating Commission (HECC)
- (2) *April 11-13, 2016*: NWCCU Site Visit
- (3) *April 27, 2016*: Western Oregon University Board of Trustees Meeting
- (4) *May 1, 2016*: University's capital request is due to the Higher Education Coordinating Commission (HECC)
- (5) *May 17, 2016*: Oregon's Primary Election
- (6) *May 23-25, 2016*: Oregon Legislature's Committee Days
- (7) *June 3, 2016*: Revenue Forecast
- (8) *July 27, 2016 (tentative)*: Western Oregon University Board of Trustees Meeting
- (9) *September 1, 2016*: HECC submits consolidated budget request for the public universities made to the Governor.
- (10) *September 2016*: Revenue Forecast
- (11) *October 26, 2016 (tentative)*: Western Oregon University Board of Trustees Meeting

- (12) *November 8, 2016*: General Election
- (13) *December 1, 2016*: Governor releases Governor’s Recommended Budget (GRB)
- (14) *December 2016*: Revenue Forecast
- (15) *January 2017*: Oregon Legislative Assembly convenes
- (16) *January 25, 2017 (tentative)*: Western Oregon University Board of Trustees Meeting
- (17) *March 2017*: Revenue Forecast
- (18) *March-April 2017*: Possible dates for Ways & Means Budget Presentation for Public Universities
- (19) *April 26, 2017 (tentative)*: Western Oregon University Board of Trustees Meeting

**Minimum Wage**

Amid several potential ballot measures swirling about to increase Oregon’s minimum wage, legislators were focused on a compromise bill in the 2016 short legislative session. Senate Bill 1532 emerged as the vehicle for minimum wage proposals. The public universities did not advocate for or against Senate Bill 1532; rather, the universities offered factual information on the fiscal impact and the number of employees affected when asked. The bill went through many rounds of amendments and procedural votes before it passed the Oregon Senate 16-12 and the Oregon House 32-26. Senate Bill 1532 creates a three-tiered minimum wage for the state, which, in turn, is phased in over the next six years. The following table illustrates how increases to the minimum wage will be phased in between 2016 and 2022.

<b>DATE</b>	<b>TIER 1:</b> Portland Urban Growth Boundary	<b>TIER 2:</b> Benton, Clackamas, Clatsop, Columbia, Deschutes, Hood River, Jackson, Josephine, Lane, Lincoln, Linn, Marion, Multnomah, Polk, Tillamook, Wasco,	<b>TIER 3:</b> Malheur, Lake, Harney, Wheeler, Sherman, Gilliam, Wallowa, Grant, Jefferson, Baker, Union, Crook, Klamath, Douglas, Coos, Curry, Umatilla and Morrow counties

		Washington, and Yamhill counties	
July 1, 2016	\$9.75	\$9.75	\$9.50
July 1, 2017	\$11.25	\$10.25	\$10.00
July 1, 2018	\$12.00	\$10.75	\$10.50
July 1, 2019	\$12.50	\$11.25	\$11.00
July 1, 2020	\$13.25	\$12.00	\$11.50
July 1, 2021	\$14.00	\$12.75	\$12.00
July 1, 2022	\$14.75	\$13.50	\$12.50

The fiscal impact for the universities was submitted by biennium through 2021-2023 and by employee category in order to demonstrate impact. For all universities, in 2021-2023, the estimated fiscal impact of the minimum wage changes is \$41 million. For WOU, the fiscal impact goes from \$88,000 in 2015-2017 to \$2.085 million in 2021-2023. The data submitted to the Legislative Fiscal Office follows:

	<b>2015-2017</b>	<b>2017-2019</b>	<b>2019-2021</b>	<b>2021-2023</b>
<b>WOU</b>	\$88,070	\$535,659	\$1,137,401	\$2,085,857

The vast majority of the impact comes from student employment. The “employee category” data submitted to the Legislative Fiscal Office regarding Western Oregon University follows:

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>
<b>SEIU Classified</b>	-	-	-	-	9	28	40
<b>Unclassified</b>	11	14	15	15	15	18	19
<b>Temporary</b>	4	13	16	19	22	29	33
<b>Student</b>	886	1002	1026	1055	1076	1096	1104
<b>TOTAL</b>	901	1029	1057	1089	1122	1171	1196

Many students work in work-study, auxiliary, and student fee-funded positions. The work-study budget from the federal government has not increased several years, so the impact of an increased minimum wage on a static federal work-study budget has yet to be determined. Further, whether or not the price for auxiliaries (housing, dining, parking, etc.) would need to increase in order to maintain a relatively stable number of student jobs or the level by which student fees would need to increase in order to maintain the student-fee funded positions has yet to be studied in significant detail.

### **Sick Leave**

In the 2015 Oregon Legislative Assembly, Senate Bill 454 proposed to offer sick leave to public and private employers in the state that employ ten or more employees. This was one of the most contentious bills of the Legislative Session, and one that went through many ideas and designs. There were 46 different proposed amendments, with

the committee only adopting two of them. The bill that was signed into law requires employers with 10 or more employees to provide paid sick leave. Those with fewer than 10 employees must provide the same leave, but are not required to pay employees for the time off. The definition of employee includes piece rate workers, salaried, hourly and commissioned workers, and home care workers. It excludes independent contractors, workers who receive sick leave under federal law, participants in a federal or state work-training program, work-study participants, railroad workers and family members working in a family business. Beginning January 1, 2016, employees accrue one hour of sick time for every 30 hours worked, up to a maximum of 40 hours of accrued leave. Leave begins to accrue on an employee's first day of work. Leave may be used in one-hour increments beginning on the 91<sup>st</sup> day of employment. Additionally, employers may require medical verification. The public universities indicated a potential fiscal impact of \$15 million for the biennium. For WOU, the fiscal impact was estimated to be approximately \$722,000. Western is already revising and implementing policy changes to ensure it complies with SB 454 mandates.

### **Current Service Level (CSL)**

In 2011, the Oregon Legislative Assembly passed Senate Bill 242. Senate Bill 242 was the first step in higher education governance reform in Oregon. While the Oregon University System was separate from much of the Oregon Department of Administrative Services (DAS) apparatus for human resources and procurement, for example, SB 242 continues to expand OUS and the public universities' autonomy by eliminating the requirement to get expenditure limitation approval to spend tuition dollars, allowed the universities to retain interest earnings on its cash (much of which was student tuition), and separated the universities from the state's risk management program and requirement to use the Attorney General for legal services. After this legislation, when the state engaged its budget process, including budget requests from the universities, the universities were only permitted to calculate a current service level budget with an approximately 3% inflationary index, even though, particularly given that many of the cost drivers that universities face are out of their control (PERS, PEBB, etc.) the current service level would be much higher.

In the 2015 legislative session, the Public University Support Fund was substantially increased as compared to the prior biennium, so the impact of an artificially low current service level for the universities was not fully realized. In the 2015 legislative session, the Ways & Means co-chairs took the unusual step of releasing a preliminary budget framework in January, and eventually augmented the Public University Support Fund by an additional \$30 million.

Nonetheless, with the universities going into the 2017 legislative session, there is profound need to communicate the true cost of operating the universities to budget writers, even if all state agencies and entities are required to take a cut. There is a

workgroup with representatives from all seven public universities—from various offices—working on a consolidated budget request for the 2017-2019 biennium that would signal the “true” current service level or “CSL”. At this juncture, estimates place that approximately 7.9%, as opposed to the 3.3% index used over the past two biennia. In the 2016 session, the universities are requesting a budget note to direct the HECC, Legislative Fiscal Office, DAS, and university representatives to come up with a new methodology of calculating the university CSL for budget-building purposes. Previously, the community colleges were successful at recasting the CSL benchmark for budget-building purposes. The current language of the budget note, as proposed by the universities, is:

The Committee recognizes that the current calculation of the Current Service Level for the funding of university operations (Public University Support Fund, State Programs, Statewide Public Services, or other operating appropriation categories that may arise in the future) does not capture the true costs of operating Oregon’s public universities and it does not provide the Legislature or the Governor with the information needed to support effective decision-making.

The Committee directs the Higher Education Coordinating Commission, in consultation with the Legislative Fiscal Office, Department of Administrative Services, and representatives from the public universities to develop a proposed method for calculating a more accurate Current Service Level for university operations. Costs incurred due to legislative directives on mandatory shared services (such as retirement, healthcare, and collective bargaining) are to be some, but not all, of costs considered by the workgroup.

The Higher Education Coordinating Commission shall submit a report and recommendations to the Joint Committee on Ways and Means or to the Emergency Board, for the Committee’s or Board’s consideration, no later than September 30, 2016.

Because of the prior history regarding the community colleges adjusting the CSL calculation, at the time of this docket’s publication, there was effort to draft the budget note to align the processes for community colleges and universities. As of February 25, 2016, the draft language for a budget note that attempts to accomplish alignment follows:

The Subcommittee recognizes that the Current Service Level (CSL) is intended to estimate the cost of legislatively approved programs in the upcoming biennium. In 2009, the Joint Committee on Way and Means approved the adoption of a CSL model for the Community College Support Fund (CCSF) to reflect health benefit and retirement costs expected to exceed the Department of Administrative Services standard inflation rate.

To ensure consistency in post-secondary state support CSL calculations, the



Department of Administrative Services (DAS) and the Legislative Fiscal Office (LFO) are directed to develop, in consultation with the Higher Education Coordinating Commission and the seven public universities, an estimated cost of applying the Community College Support Fund model to the Public University Support Fund, the Agricultural Experiment Station, the Extension Service, the Forest Research Laboratory, and Public University State Programs. The estimate will include data elements that the public universities will be required to submit to HECC in order to implement the model.

DAS and LFO will provide the estimated cost to implement the Community College Support Fund CSL model for Public University state support to the Emergency Board, through the Legislative Fiscal Office, by July 1, 2016.”

While this is a step in the right direction, the universities will continue to work on illustrating the true costs of university operation in constructing budgets, including the costs of many of the initiatives included in this memorandum, such as minimum wage, sick leave, and increased personnel costs (which would not be captured in a health insurance/retirement only CSL calculation).

### **Adjunct Healthcare**

Health insurance for adjunct faculty members was raised in the 2015 legislative session. Senator Dembrow sponsored Senate Bill 702 which, as introduced, would have allowed part-time faculty members to aggregate 30 or more hours a week from different postsecondary institutions to determine eligibility for health insurance benefits. The bill received a public hearing in the Senate Education Committee and -1 amendments, dictating the percentage of health care costs to be borne by the employee and employer passed a party-line vote, but the bill did not advance. The topic, however, was included in a gut-and-stuff of Senate Bill 113, asking the Higher Education Coordinating Commission to study the issue and offer recommendations to the Legislature. After extensive study with various stakeholders, the HECC issued a report on its Senate Bill 113 workgroups and determined, due to the vast complexity of the issue and overlay of the Affordable Care Act requirements, more information was necessary in order to formulate legislative recommendations. The HECC’s full report can be viewed at:

[http://www.oregon.gov/HigherEd/Documents/HECC/Reports-and-Presentations/SB113ReportPTHealth%20Benefits\\_FINAL.pdf](http://www.oregon.gov/HigherEd/Documents/HECC/Reports-and-Presentations/SB113ReportPTHealth%20Benefits_FINAL.pdf)

The universities will be prepared to examine any legislative proposals on adjunct health insurance that might be introduced for the 2017 legislative session.

### **Revenue Forecasts**

As many of these factors converge prior to, and during, the 2017 legislative session, the universities will pay close attention to the state's revenue forecasts. Oregon issues revenue forecasts four times a year—usually in March, June, October, and December. Each allows for adjustment and calibration for the state's budget situation. The March 2016 revenue forecast was issued on February 10, 2016, and showed a modest uptick of \$36M—amid much concern—in state revenue.

The entire March 2016 revenue forecast can be found here:

<http://www.oregon.gov/DAS/OEA/docs/economic/forecast0316.pdf>

The presentation slides for the March 2016 revenue forecast can be found here:

<http://www.oregon.gov/DAS/OEA/docs/economic/oeaforecast0316.pdf>

### **Ballot Measure**

The organization *Our Oregon* has filed three proposed initiative petitions for the November 2016 ballot. Each would require 88,184 signatures to qualify. Initiative Petitions 22 and 23 would establish a corporate gross receipts tax on corporations with sales of at least \$25 million per year. The tax would be \$30,001 plus 2.5 percent of the excess over \$25 million. IP 23 would direct all revenue to schools while IP 22 does not designate how the money would be spent. The revenue impact could be up to \$3 billion per year. In the 2016 legislative session, there was some effort to fashion a corporate tax compromise in order to prevent more aggressive proposals from reaching the ballot, including a plan from Senate Democrats to replace Oregon's corporate income tax with a commercial activity tax. That proposal would have raised approximately \$1 billion each year.

### **PERS**

In the 2013 session, the legislature, in Senate Bill 861 and Senate Bill 822, attempted to implement significant savings in PERS costs, focused primarily on cost-of-living-adjusted. If realized, the reforms would have saved \$5.3 billion for the state. In April 2015, the Oregon Supreme Court struck down the vast majority of the reforms in Moro v. State of Oregon, ruling that the reforms impermissibly and unconstitutionally impaired the contract rights of the PERS recipients that would have received the COLA increases and adjustments. At the time of the 2013 reforms, PERS' unfunded liability sat at around \$8 billion. December 2015 estimates placed the unfunded liability at \$20.5 billion. PERS held town halls across the state to discuss and describe the situation and what might be necessary in order to confront its unfunded liability. The general message at that time was to be prepared for 20% increases in assessments, which represents three to four percent of payroll. When the universities started work on

modeling a “true” current service level, as described above and using available information about the unfunded liability, assessments, and market performance, the universities estimated total retirement costs going up \$59.4 million, or a biennial increase of 21.1%. Because of a slightly different mix of employees and retirement benefits, WOU’s share of that estimated assessment was \$3.8 million or a 24.6% increase. The actual 2017-2019 assessment rates will not be set until September 2016. Further, the assessments could go up even more than the estimates represented here because the final decision will use the valuation date on December 31, 2015.

The PowerPoint presentation used by the PERS executive director in the town hall meetings can be found here:

[http://www.oregon.gov/pers/EMP/docs/er\\_general\\_information/pers\\_employer\\_town\\_halls\\_slide\\_deck.pdf](http://www.oregon.gov/pers/EMP/docs/er_general_information/pers_employer_town_halls_slide_deck.pdf)

TOTAL Fall Undergraduate Headcount by Academic Area 2010-2015						
	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2015
American Sign Language Studies	108	125	112	166	156	156
Anthropology	29	36	28	31	27	29
Art	130	126	113	90	71	58
Biology	181	173	207	191	180	188
Business	605	606	636	601	555	551
Chemistry	39	32	49	53	59	51
Communication Studies	141	142	138	131	120	108
Computer Science	225	196	215	243	242	219
Criminal Justice	396	452	481	483	464	377
Dance	32	29	33	31	30	24
Earth Science	31	39	41	27	27	34
Economics	44	47	48	41	44	39
English	139	121	124	99	76	61
Exercise Science	193	230	235	257	261	261
Geography	18	17	12	13	12	16
German Studies	6	6	7	5	1	2
Gerontology	-	14	33	35	43	34
Health	129	156	162	180	180	186
History	100	72	67	57	58	54
Humanities	14	23	22	18	16	20
Interdisciplinary Studies	109	87	101	141	129	111
International Studies	15	17	18	14	14	17
Mathematics	46	60	47	51	44	33
Music	74	76	86	81	78	65
Natural Science	-	3	3	5	2	1
No Major	364	362	332	271	255	274
Philosophy	16	14	12	10	7	4
Political Science	79	94	86	86	86	82
Pre-professional	329	370	329	291	263	241
Psychology	369	414	402	395	397	375
Social Science	83	108	97	90	97	92
Sociology	39	53	59	56	58	52
Spanish	41	34	40	34	15	15
Teacher Education	907	821	678	624	621	715
Theater Arts	57	66	64	50	52	54
Visual Communication Design	-	-	24	50	52	66
Total	5,088	5,221	5141	5001	4792	4665

Percentage of New Freshmen Enrolled in the Fall Term of each Successive Year, Sorted Fall Freshman Major

	Retention Rate (Year1 to 2)	Retention Rate (Year1 to 3)	Retention Rate (Year 1 to 4)
American Sign Language Studies	80.56%	74.17%	59.38%
Anthropology	57.69%	50.77%	23.08%
Art	65.75%	62.47%	57.53%
Biology	72.49%	49.78%	46.51%
Business	62.48%	45.03%	40.24%
Chemistry	79.03%	65.81%	60.48%
Communication Studies	74.29%	54.86%	45.00%
Computer Science	61.65%	44.21%	37.22%
Criminal Justice	69.75%	53.70%	46.74%
Dance	74.36%	70.77%	50.00%
Earth Science	72.22%	53.33%	50.00%
Economics	86.67%	64.00%	60.00%
English	86.67%	74.00%	60.00%
Exercise Science	72.57%	57.60%	39.43%
Geography	100.00%	60.00%	60.00%
German Studies	100.00%	80.00%	50.00%
Gerontology	87.50%	60.00%	56.25%
Health	81.48%	66.67%	44.44%
History	76.56%	54.38%	53.91%
Humanities	85.71%	68.57%	42.86%
Interdisciplinary Studies			
International Studies	80.00%	72.00%	45.00%
Mathematics	68.63%	65.88%	50.00%
Music	72.53%	63.30%	59.34%
Natural Science	100.00%	100.00%	75.00%
No Major Declared	65.35%	51.64%	48.75%
Philosophy	66.67%	66.67%	50.00%
Political Science	70.18%	48.42%	44.21%
Pre-Professional Studies	67.88%	52.15%	45.75%
Psychology	67.35%	52.94%	45.88%
Social Science	71.11%	61.33%	40.00%
Sociology	77.55%	61.22%	45.92%
Spanish	75.00%	78.00%	66.00%
Teacher Education	75.82%	65.15%	59.81%
Theater Arts	91.38%	70.34%	72.41%
Visual Communication Design			
<b>Average</b>	<b>70.21%</b>	<b>55.93%</b>	<b>49.49%</b>

<b>Retention to Sophomore Year 2010 to 2014 Entering Freshmen Cohorts</b>			
	N	Number Retained	Percent Retained
Female	2849	2061	72.34%
Male	1862	1214	65.20%
First Generation	2100	1420	67.62%
Not First Generation	2611	1855	71.05%
American Indian/Alaskan N	101	65	64.36%
Asian	202	140	69.31%
Black/African American	227	139	61.23%
Hispanic	542	402	74.17%
Pacific Islander	173	107	61.85%
White	3182	2216	69.64%
Two or More Races	34	18	52.94%
Non Resident Alien	96	72	75.00%
Unknown/Did Not Respond	154	116	75.32%
Pell Grant Recipients	2324	1625	69.92%
No Pell Grant	2387	1650	69.12%

Note: Gender, First Generation status, and Race/Ethnicity status are self-disclosed

<b>Total Undergraduate Degrees Awarded 2010-11 to 2014-15</b>						
	2010-11	2011-12	2012-13	2013-14	2014-15	Change
American Sign Language	30	29	37	30	28	-6.67%
Anthropology	3	5	8	4	5	66.67%
Art	16	26	20	19	12	-25.00%
Biology	33	34	21	22	30	-9.09%
Business	133	139	154	146	148	11.28%
Chemistry	5	3	0	4	8	60.00%
Communication Studies	27	33	57	31	35	29.63%
Computer Science	35	53	28	15	54	54.29%
Criminal Justice	50	72	77	86	125	150.00%
Dance	5	9	6	5	4	-20.00%
Earth Science	6	8	10	5	7	16.67%
Economics	14	16	26	17	27	92.86%
English	33	34	41	26	19	-42.42%
Exercise Science	53	53	53	46	69	30.19%
Geography	3	6	2	4	0	-100.00%
German Studies	-	0	2	1	2	200.00%
Gerontology	-	3	5	15	23	New
Health	30	70	48	56	56	86.67%
History	20	12	10	13	12	-40.00%
Humanities	9	8	10	4	5	-44.44%
Interdisciplinary Studies	68	75	94	85	82	20.59%
International Studies	4	3	2	3	2	-50.00%
Mathematics	7	5	11	9	10	42.86%
Music	10	12	11	12	6	-40.00%
Natural Science	-	1	0	2	1	100.00%
No Major	Not applicable					
Philosophy	4	8	1	4	2	-50.00%
Political Science	23	20	24	25	25	8.70%
Pre-professional	Not applicable					
Psychology	82	108	84	82	109	32.93%
Social Science	31	49	36	28	40	29.03%
Sociology	12	7	8	8	5	-58.33%
Spanish	13	12	11	21	18	38.46%
Teacher Education	87	199	101	100	59	-32.18%
Theater Arts	7	16	11	11	12	71.43%
Visual Communication Des	-	0	6	8	11	New
<b>Total</b>	<b>882</b>	<b>1157</b>	<b>1015</b>	<b>947</b>	<b>1045</b>	<b>18.48%</b>

## **Some Factors which Attract Students to WOU and Engage them in Campus Life**

### Modern Facilities

Ackerman Hall (2010) is our newest residence hall and LEED certified Platinum. It was the first residence hall in the country of this capacity to have LEED Platinum certification. Ackerman Hall houses both first-year and upper-class students and has 10 living-learning communities. The residence hall has solar panels which help defer electricity costs for the building and the building also utilizes rain water collected for toilets. Today's students practice and value sustainability and look at campuses which also implement sustainable practices.

The Health and Wellness Center opened in March, 2011, and is LEED certified Gold. The Center includes 52,000 square feet in recreation space. Students can climb on the 40'x40' climbing wall, play sports on the two full-size courts, play racquetball, or take part in fitness classes in the three multipurpose rooms. The center averages 5,440 visits a week. Last year 81% of the student body utilized the HWC at least once during the academic year.

The Woodcock College of Education and new Student Health and Counseling Center will continue to add to WOU's modern facilities and emphasize sustainability as each building will meet the LEED certified Silver standing.

### Sustainability

As stated above, WOU has been constructing LEED certified buildings for the last six years. Students coming to WOU are looking at environmentally conscious activities. WOU also works to reduce waste. 80% of garbage produced in Campus Dining is composted. All of the "to go" plates, silverware, cups, napkins, clamshells, straws and lids are all compostable. Campus Dining also works to purchase goods locally to reduce their carbon footprint. A student group was formed in the last five years, "The Green Team," which helps with recycling in the residence halls and focuses on other sustainable projects.

### Activities

There are many opportunities for students to gain **Leadership Development** skills and be involved on-campus. Students can be resident assistants, orientation leaders, serve in student government or join one of the 80 plus student organizations. The Student Activities Board plans campus activities such as comedians, dances and concerts. Student Media provides students the opportunity to write for the campus newspaper, serve as a DJ for the campus radio station, and create a literary journal.



**Greek Life** is new to WOU having just started in 2013. We have two fraternities and two sororities who have chapters on our campus. These organizations have brought new social club options to students. These organizations have also provided more philanthropic activities which have benefited WOU and the Monmouth-Independence community.

**Club Sports** also draw students to campus. WOU has four club sports which compete at the collegiate level: men's lacrosse, men's soccer, and men's and women's rugby. Men's lacrosse has had good success and has participated in the national tournament six times in the last seven years. Men's rugby has also had some national tournament experience, but not in the last few years. Women's rugby participated in the national championship in 2004 and has been having renewed success the past couple of years. Approximately 150 students participate in club sports.

The **Health and Wellness Center (HWC)** is a unique facility for a campus our size. No other public school in the state of Oregon our size, or any private school as well in Oregon has the type of comprehensive recreation facility WOU offers students. The facility is generally open during the weekdays 6:00 am – 11:00 pm and weekends 10:00 am – 10:00 pm. The HWC also offers Intramural sport competition and free fitness classes. In addition, the pool is available to local community members.

**Service Learning** provides Alternative Break (AB) and International Service Trips to students. Generally two AB trips occur during Winter Break, and four AB trips occur during Spring Break. Student leaders determine the location and type of service each trip undertakes. AB teams work with homeless shelters, soup kitchens, Habitat for Humanity, and AIDS programs as examples. Generally two International Service Trips occur each year. Students have helped build a community center in India, helped with an orphanage in Honduras, and rescued sea turtles in Guatemala to name a few. Approximately 100 students participate in a service trip each year.

## **Student Services which support Student Retention and Academic Success**

Numerous research studies have shown that students who are involved in an activity or in some other way connected to campus perform better academically (get better grades) and are more likely to be retained and graduate than students who are not involved in an activity or in some other way connected to campus. So in addition to encouraging students to become involved in activities on-campus, the following resources and programs also facilitate retention and academic success.

**The Student Enrichment Program (SEP)** is a U.S. Department of Education TRiO Student Support Services grant program serving first-generation, low-income, and / or disabled students. Over 3,000 students are eligible for services through SEP. However, the grant only allows 250 students to be served. The University has added additional funding for an additional 225 students to be served. On the most recent 5-year average, SEP retains students from their freshman to sophomore year 78.6% rate as compared to the overall WOU average of 68.8%. SEP's six-year graduation rate also surpasses the WOU general population with a 48.3% rate as compared to 45.6% for other first-generation students not served by SEP, and 47.4% compared to non-first-generation students.

**University Housing** offers 10 live-learn communities in Ackerman Hall. These include: American Sign Language, Creative Arts, Criminal Justice, Future Educators, Global Connections, Health Sciences, Honors, Outdoor Adventure and two communities in Sustainability. Each community has a faculty or staff advisor who works with students in the community, attends programs and events, and serves as a mentor.

**Multicultural Student Services and Programs (MSSP)** serves as a center and resource for all students of color. MSSP also organizes several major programs throughout the year: Dia de los Meurtos, Pow-Wow, African American Celebration, Women of Color Celebration, Out and Proud, and Neustra Fiesta Latina.

The Diversity Scholars program is coordinated through the MSSP office. Students who receive the Diversity Commitment Scholarship participate in a year-long class and must meet with staff in the MSSP throughout the year. The five-year average retention rate of Diversity Scholars is 83% as compared with 69% of the general WOU student population.

MSSP also offers On-Track, which provides many elements similar to the SEP program. It is an additional support program for students who are not selected for the SEP

program. The five-year retention rate for On-Track participants is 84%.

The **Office of Disability Services (ODS)** serves students with documented disabilities to ensure access to programs and services. Over 435 students receive services through ODS. Students have documented disabilities including, but not limited to: Attention Deficit Disorder, Asperger Syndrome, Autism, Deaf and Hard of Hearing, Diabetes, Head Injuries, Learning Disability, Orthopedic, Psychological, Seizures, Speech, Blind and Low Vision. WOU has the largest Deaf and Hard of Hearing student population of all public institutions in Oregon and is the only campus to have four, full-time sign language interpreters on staff.

The **Academic Advising and Learning Center (AALC)** serves two functions: academic advising and subject-specific tutoring. Academic Advising advises pre-education, pre-nursing, and exploratory students and offers programs for academically at-risk students; the Learning Center offers a computer lab, study skills assistance, and tutoring services. Students do not pay for tutoring and may utilize two hours per subject each term, from the second to tenth week.

The Student Success Specialist in the AALC works with the Wolf Connect System, an early-alert software program which allows faculty and staff to identify students at risk academically and personally. The Student Success Specialist works with referred students to address barriers which may prevent persistence to graduation. The program has been highly successful resulting in keeping students on track toward degree completion and referrals to other campus supports.

The **Writing Center** offers one-to-one and synchronous tutoring sessions, facilitates in-class writing workshops for upper-division and graduate-level classes from across the curriculum, and mentors individual faculty as they create writing assignments and grading rubrics, produces texts to meet the rhetorical and genre-specific needs of other campus units. In the 2014-15 academic year, 441 courses were supported by Writing Center services, with 18% of sessions supporting graduate students and 53% of the total client base being repeated users. Students who use the writing center show an increase in writing self-efficacy compared to students who don't use the Center.

The **Math Center** offers free drop-in tutoring to students taking remedial, 100 and 200 level mathematics coursework, and non-mathematics coursework with low level mathematics content. Located in the Hamersly Library, the Center is open Monday – Friday. The Math Center has more than 100 visits each week.

The **Office of International Student Academic Support** coordinates writing, linguistics, and interdisciplinary studies courses that are specifically designed to meet the language and cultural needs of international students. The International Learning Specialist instructs a term-long orientation course for new international students, provides academic advising, consults with individuals who are struggling in their courses, and provides administrative assistance. Additional support programs run by the office include a Conversation Partners Program, an English Tutoring Center staffed by peers who are in the Teaching English as a Foreign Language Certificate Program, alternate testing location and proctoring, and various electronic devices (translators and smartpens) for students to check out.

About 10 years ago, the University invested in **Wolf Ride**, a safe ride program for students. It is not a designated driver program. Initially started to provide transportation for the growing international population, the purpose of Wolf Ride is to provide a free and reliable shuttle service to students who would otherwise walk alone at night and risk their safety. Wolf Ride provides service to the entire Monmouth and Independence community. Students use Wolf Ride to get to grocery stores, restaurants, the movie theater, and other businesses. Wolf Ride also provides connecting service to the Hut Transportation, Amtrak, and Greyhound bus line before and after winter, spring and summer breaks. Students have taken over the cost of operation of the Wolf Ride and it is now a part of the Incidental Fee.

**Academic Affairs Executive Committee  
Strategic Planning Preparation  
February 2016**

Note to Trustees: Each week the Academic Affairs Executive Committee meets to work on strategic and tactical issues related to our programming at WOU. The group includes Dean Sue Monahan, Dean Mark Girod, Dean Allen McKiel, The Research Institute Director Ella Taylor, Graduate Programs Director Linda Stonecipher, Center for Academic Innovation Director Dan Clark, Registrar Amy Clark, Director of Academic Affairs and Operations Cat McGrew and Associate Provost David McDonald and Provost Steve Scheck. Below is a summary of topics the group has been discussing in preparation for moving into the campus-wide strategic planning initiative.

**As we prepare for strategic planning, the Academic Affairs Executive Committee commits to:**

- Sustainably serving the public good through education, research, and service
- Responding to student needs, state needs, and market opportunities
- Making decisions using transparent, data-driven, and collaborative processes
- Being accountable to students, employees, and the State of Oregon
- Continually improving operational policies and processes to ensure they are effective, efficient and transparent

**We believe that in the next five years WOU must:**

- Increase undergraduate and graduate enrollments to levels that ensure fiscal sustainability
- Increase first-to-second year retention rates to 80% or more
- Increase 6-year graduation rates to 60% or more
- Improve the quality of our educational experience while ensuring undergraduate students can complete a degree in 180 credits
- Reallocate resources as needed to achieve our goals
- Meet the educational needs of an increasingly diverse student body
- Expand our strategic partnerships to fully serve as the Mid-Willamette Valley's public educational institution

We recognize that our goals may link across university units and that strategies we implement will likely advance multiple goals, simultaneously.

There are multiple ways to pursue these goals. Through the strategic planning process, our whole campus will consider our future, coalesce around goals, prioritize efforts, and determine strategies.

Strategies we have discussed or initiated within Academic Affairs include:

### **Innovative Curriculum and Delivery**

- Enhance and grow areas of strength, and disinvest from underperforming programs
- Increase programs and courses delivered online and in other flexible formats to serve diverse students
- Diversify graduate portfolio and expand graduate certificate programs to serve the growing need for post-baccalaureate education
- Use assessment data to continually improve the WOU education
- Eliminate barriers to graduation by right-sizing degree program and general education requirements, and by offering flexible pathways to degree
- Expand high impact experiences including first-year experiences, undergraduate research opportunities, service learning, internships and capstone courses

***Key questions that will shape our future:*** What criteria will determine our academic priorities? Through what processes shall we continually review, improve and make difficult decisions to constrain or discontinue programs?

### **Actively Managing our Mix of Students**

- Identify, implement, and assess evidence-based practices to achieve targeted enrollments
- Increase nontraditional degree-completers as a percentage of students, adapting programs and processes to serve these students
- Increase percentage of Latino students and adapt programs and processes to effectively serve them
- Expand educational opportunities for local business, industry, and government

***Key questions that will shape our future:*** What is our target for total enrollments, and what is the appropriate balance between graduate and undergraduate enrollments? The balance between resident, non-resident and international students? The balance of stand-alone certificate programs, associate of arts options for non-completers?

### **Enhancing Student Support**

- Identify, implement, and assess evidence-based practices to achieve targeted retention rates
- Optimize student-to-advisor ratio and increase faculty engagement/competency in academic advising

- Improve operations by modernizing practices and systems to support WOU's mission and students
- Invest in professional development for our staff to more effectively engage and serve our students
- Expand mentorship, practicum, and internship opportunities for WOU students
- Provide access to career advising that connects students to alumni
- Refine course scheduling practices to re-establish WOU as a five-day-a-week campus
- Identify and promote programming most suitable for evening/weekend college

***Key questions that will shape our future:*** Who are WOU students? Who could be WOU students? What do they need to succeed?

### **Strengthening our Faculty**

- Increase diversity of faculty to reflect the diversity of our students
- Promote excellence in teaching through systemic approaches to professional development
- Allocate faculty time to highest priority activities using workload analysis
- Invest in infrastructure for sponsored research and expand extramurally funded research

***Key questions that will shape our future:*** What is our target for student-to-faculty ratio? What is the appropriate balance of tenure-track and non-tenure track faculty? What is the balance of full-time vs. part-time non-tenure track faculty? What is the balance of tenure-track faculty work load for teaching-scholarship-service? How can we continue to improve the competitiveness of our faculty and staff salaries going forward?

### **Managing our External Relations**

- Pursue strategic growth of revenue streams (enrollment, state outcomes funding, research, philanthropy, and auxiliary resources) to support institutional mission and WOU's students
- Strengthen/establish well-defined partnerships with K-12 education and community colleges
- Strengthen the branding and marketing with WOU public relations to share the impact of WOU on students, alumni, and local communities