



MEETING OF THE WOU BOARD OF TRUSTEES

MEETING NO. 51 – JUNE 8, 2022

10:00AM-3:00PM

WERNER UNIVERSITY CENTER | COLUMBIA ROOM

To observe the meeting: wou.edu/livestream

Audio only, call: +1 346 248 7799 US | Meeting ID: 895 7391 5820

AGENDA

I. CALL-TO-MEETING / ROLL CALL

II. CHAIR'S WELCOME

III. CONSENT AGENDA ([Appendix A](#))

1) Meeting Minutes:

a) [December 14, 2021](#)

b) [April 7, 2022](#)

c) [April 14, 2022](#)

d) [April 18, 2022](#)

e) [April 20, 2022](#)

f) [May 18, 2022](#)

2) [FY22 Management Report](#) (As of April 30, 2022)

3) [List of Contracts/Grants that exceed \\$100,000 in FY22](#)

IV. PUBLIC COMMENT

V. STAKEHOLDER UPDATES

1) SHARED GOVERNANCE

a. ASWOU

b. [Faculty Senate](#) (page 3)

c. Staff Senate



2) UNION

- a. SEIU
- b. WOUFT

VI. COMMITTEE REPORTS

- 1) ACADEMIC & STUDENT AFFAIRS COMMITTEE (ASAC)**
- 2) DIVERSITY, EQUITY, INCLUSION, & ACCESSIBILITY COMMITTEE (DEIAC)**
- 3) EXECUTIVE GOVERNANCE & TRUSTEESHIP COMMITTEE (EGTC)**
- 4) FINANCE & ADMINISTRATION COMMITTEE (FAC)**

VII. BREAK

- 1) LUNCH/PRESENTATION: [Occupational Therapy Doctorate](#) (Page 8)**
Dr. Rob Winningham, Provost & Vice President for Academic Affairs &
Dr. Hillary Fouts, Dean of Graduate Studies & Research

VIII. ACTION ITEMS

- 2) [Occupational Therapy Doctorate](#) (Page 37)**
- 3) [FY2023 Preliminary Budget](#) (Page 53)**
- 4) [Quasi Endowment](#) (Page 73)**
- 5) [Interim President Employment Agreement Amendment](#) (Page 74)**
- 6) [Board Chair Election](#) (Page 75)**

IX. BREAK

- X. [PRESIDENT KENTON Update](#) (Page 76)** (Cabinet full reports in [Appendix B](#))

XI. PRESIDENTIAL APPOINTMENT

XII. FINAL ANNOUNCEMENTS

XIII. ADJOURNMENT

Faculty Senate Report to the Board of Trustees April 20, 2022

1. Curriculum Changes

Curriculum changes slow down after Winter quarter and the catalog deadline. Most changes are to clean up the catalog copy. At the bachelors and masters degree levels, Faculty Senate has approved two course modifications, seven program modifications, and three programs were dropped.

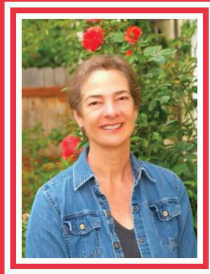
Type/Level	Modifications	New	Drop
Course			
Undergraduate	2		
Graduate			
Bulk			
Program			
Undergraduate	5		1
Graduate	2		2
Bulk			

2. Faculty & Program Celebrations

Please see the celebrations on the next nine pages.

Who	What/Description
Margaret Manoogian, Gerontology	<p><i>Meeting our mothers: Armenian Mothers</i></p> <p>This national presentation was given on April 21st as a 'solemn' celebration sponsored by <i>The Mercer County Holocaust, Genocide and Human Rights Education Center</i>. This was an amazing collaboration with Michael Bar Akiva, a NY playwright and three Armenian women actors who voiced the narratives Dr. Manoogian collected from older Armenian American women who were survivors or whose parents were survivors of the Armenian Genocide. The study focused on the intergenerational transmissions that occur across generations when there is a cultural trauma like a genocide. April 24th is annually noted as Armenian Genocide Remembrance Day. The three women voiced the narratives in three acts, and Dr. Manoogian talked of the research between each act. Here is the recording <https://www.youtube.com/watch?v=OQ8fwyOvh7c> and the flyer that advertised the event.</p>

The Mercer County Holocaust, Genocide and Human Rights Education Center
and William Paterson University Center for Holocaust & Genocide Studies Present



Meeting Our Mothers: Armenian Legacies

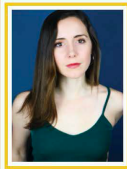
April 21, 2022

7 pm ET via Zoom

We are pleased to present Dr. Margaret Manoogian,
Professor of Gerontology, Western Oregon University, in
commemoration of the Armenian Genocide.



Leslie Ayvazian



Talene Monahan



Lory Tatoulian

With a performance by
Leslie Ayvazian,
Talene Monahan, &
Lory Tatoulian

Moderated by
Michael Bar-Akiva,
Founder & Creative Director,
Novel Readings

To register, click on this link: <https://forms.office.com/r/0Qtpv8hquu>

The Mercer County
Holocaust, Genocide and Human Rights
Education Center



Mary
Pettenger,
WOU Tree
Advisory
Committee

WOU recertified as a Tree Campus Higher Education

The Western Oregon University Tree Advisory Committee (WOUTAC) is pleased to report that WOU was recently "recertified" as a Tree Campus Higher Education campus by the Arbor Day Foundation. This is the seventh consecutive year Western has been recognized! The administration's financial support of the committee's work is especially important because a college campus, in order to be recognized by the Arbor Day Foundation, must allocate finances for its annual campus tree program. The committee is most grateful for this critical financial support.



Gay
Timken,
Health &
Exercise
Science

Pole Pedal Paddle

HEXS fielded two teams for Pole Pedal Paddle May 14th in Bend. The 'old' crew took 2nd in their age category. We had a great day and were happy to spread the WOU name around Central Oregon.

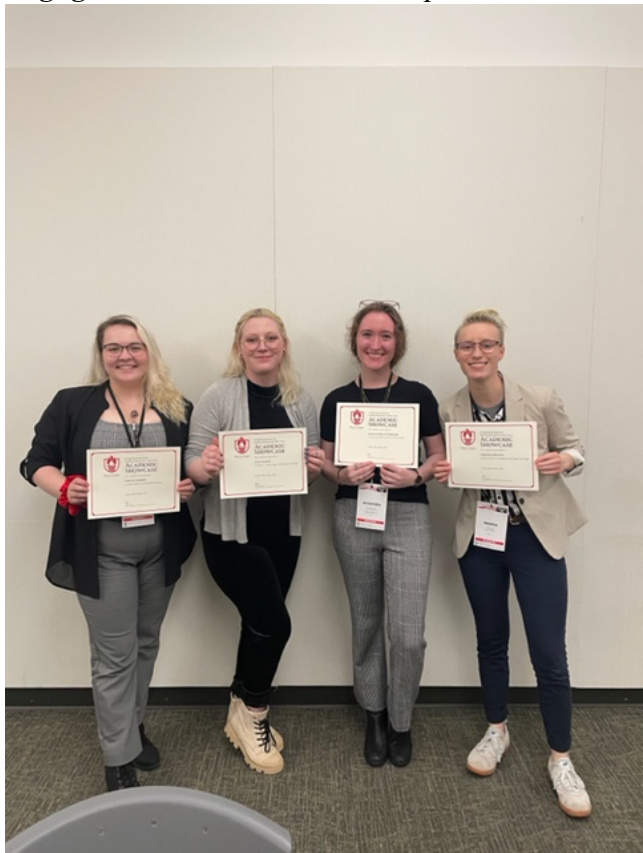


Leanne
Merrill,
Mathematics
Department

Polk County Math Festival

After a 3 year hiatus, the Math Department rebranded its Sonia Kovalevsky Day into the Polk County Math Festival. This diversity-focused, gender-inclusive mathematics event for high school students and community members brought over 30 people to campus on May 21st for a day of math festivities led by our own WOU Mathematics majors and faculty members. High school student attendees had the opportunity to tour campus, hear from keynote speaker Dr. Naomi Adeline from Polk County Public Health, and interact with college student mentors. This annual event aims to increase mathematical creativity, persistence, and community in Polk County and the surrounding areas, and is supported by the Mathematical Association of America and the WOU College of Liberal Arts and Sciences Dean's Office.



<p>Daniel Tankersly, Art Department</p>	<p><i>ArtFest</i> On Wednesday, May 18 the Art Department held our first ever ArtFest here on campus. Events included:</p> <ul style="list-style-type: none"> • ArtFest Regional 2022 high school and community college student art exhibition in Hamersly Library • 54th Annual Juried WOU Student Art & Design Exhibition in Cannon Gallery at Campbell Hall and ITC gallery • Art Department student awards ceremony • Instructional Technology Center reopening ceremony • T-shirt giveaway and tie-dye party, with free WOU Art & Design t-shirts and stickers designed by current WOU students <p>The event has been covered by several newspapers, including this in-depth article from the Woodburn Independent: https://pamplinmedia.com/wbi/152-news/546655-437423-whs-artists-take-it-to-the-campus?wallit_nosession=1</p>
<p>Steve Taylor, Geology</p>	<p><i>WOU Earth and Environmental Students Shine with High-Impact Professional Engagement and Field-Based Experiential Learning</i></p>  <p>Senior Seminar Students included Grace Comer, Elle' Knopp, Alex Evernden, and Melina Mullin</p>

On May 24, a team of 10 students from the WOU Earth and Environmental Science Department participated at the Spring 2022 Student Night conference of the Oregon Chapter, Association of Engineering and Environmental Geologists, followed by team participation at the WOU Academic Excellence Showcase on May 26. Dr. Steve Taylor, Professor of Geology, organized the group theme presentation by students enrolled in ES 473 Environmental Geology and ES 497 Senior Seminar. The group topic focus was on the occurrence of landslides in western Oregon: causes, effects and consequences with case-study examples. The engagement emphasized real-world problem solving and training in applied geoscience with career outcomes in the state of Oregon and beyond.

Jeff
Templeton,
Geology

Volcanology

During a weekend field trip on May 13-15, a group of WOU Earth and Environmental Science students braved the wilds of central Oregon as part of the ES 454 Volcanology class. Led by Dr. Jeff Templeton, Professor of Geology, the class visited and studied a diverse suite of volcanic rocks around Newberry Volcano. Field trip favorites included hiking into the crater at Fort Rock, studying several pyroclastic deposits in the region, and exploring a lava tube near Bend. Field experiences like this provide an ideal framework for teaching undergraduate students about fundamental volcanology concepts, as well as core geoscience and professional skills.



Volcanology students from left to right: Melina Mullin, Elle' Knopp, Grace Comer, Alex Evernden, John Shifferer, Hailey Chatterley, Elden Meeuwssen, Joseph Brooks, Sean Finney, and Jennifer Knight

Occupational Therapy Doctorate

Occupational Therapy Work Group

Katrina Hovey

Associate Professor of Special Education

Ethan McMahan

Division Chair and Professor of Psychological Sciences

Hillary Fouts

Dean of Graduate Studies and Research

Margaret Manoogian

Professor of Gerontology

Gay Timken

Division Chair and Professor of Health and Exercise Science

What is Occupational Therapy?

According to the American Occupational Therapy Association (AOTA):

- Occupational therapists help “people across the lifespan to do the things they want and need to do through the therapeutic use of daily activities (occupations).”
 - This enables “people of all ages to live life to its fullest by helping them promote health, and prevent—or live better with—injury, illness, or disability.”
- OT interventions focus on adapting the environment or task to fit the person, which help:
 - Children with disabilities participate fully in school and social situations
 - Older adults experiencing physical and cognitive changes
 - People recovering from injuries to regain skills

Oregon Setting

- 1 established OTD programs in Oregon (Pacific University)
 - Number of spaces for new students: 40
- 1 new OTD program pending accreditation (Western University of Health Sciences)
- No public university in Oregon has an OTD program
 - No public university in WA has an OTD program (3 ACOTE WA applicants: PNW University of Health Sciences, UPS, Whitworth U)

Market for Occupational Therapy

- A growing high demand for Occupational Therapists in Oregon and across the U.S.
- 17% growth rate in U.S. for Occupational Therapist positions
- 19% growth rate in Oregon for Occupational Therapist Positions
 - Both are much faster than the average growth rate (8%) according to the U.S. Bureau of Labor Statistics (as of September 8, 2021)
- Projected 10K annual OT job openings nationally and 120 annual OT openings in Oregon (2019-2029)
- Oregon annual mean wage for Occupational Therapists is \$91K
 - Median U.S. salary \$86K
- Exam pass rate for OTD
 - National Average 2020: 97%

WOU's Impact on Oregon

- Meeting the growing need for Occupational Therapists in Oregon
- WOU is an emerging HSI with a track-record of educating bilingual students
 - Bilingual Teacher Scholars, ASL
 - WOU is uniquely positioned to increase the number of bilingual Occupational Therapists in Oregon
- Medically underserved populations (MUPs) in Oregon encounter barriers to accessing health care services
 - Typical barriers: economic, cultural, and linguistic
 - Increasing bilingual Occupational Therapists in Oregon would positively impact MUPs

Benefits to WOU

- Brings more students to WOU and in turn new revenue that helps the entire university
 - Increased revenue benefits all of WOU
 - Provides the ability to support higher cost / lower enrollment areas
- WOU as the first public Oregon university with an OTD program would enhance our visibility
 - OT-interested UG students likely to increasingly choose WOU, enhancing overall UG enrollment
- UG prerequisites for OT will draw from many programs across campus

Enrollment Possibilities

- Graduate
 - Occupational Therapy Doctoral Program: 88-120 new students by year three
- An OTD will create undergraduate opportunities
 - Common UG majors of OTD graduates: psychology, gerontology, exercise science, public health, education, business, biology, sociology
 - Many allied fields for OT

Approval Process

Approvals Required

- Graduate Studies Committee
- Faculty Senate
- WOU Board of Trustees
- WOU Administration
- Statewide Provost Council (Oregon Public Universities)
- Higher Ed Coordinating Commission (HECC)
- Northwest Commission on Colleges and Universities (NWCCU)
- For OTD accreditation: Accreditation Council for Occupational Therapy Education (ACOTE)

ACOTE Approval Process

- Notification to ACOTE of intent to seek accreditation
 - Board of Trustees approval
 - NWCCU approval
 - State approval
- Notification to ACOTE that WOU has hired a director
 - Director hired and onsite 1 year before submission of candidacy application
 - Academic fieldwork coordinator hired and onsite 6 months prior to submission of candidacy application
- Program director attends Developing Program workshop and Self-study workshop
- Application for candidacy (12 applications reviewed per cycle)
 - Projected submission: 2023/2024

ACOTE Approval Process, cont.

- Candidacy granted
- First cohort starts classes (year 1 of 3)
 - Projected: Fall 2024
- Self study report and site visit (last term of program)
- Completion of accreditation (prior to graduation of first cohort)

Draft Curriculum

OTD Curriculum

- Created in partnership with Dr. Paula Kramer, experienced founding director at other universities and former ACOTE President
- ACOTE Standards compliant
- Factored in WOU strengths
 - Emerging HSI
 - Increase numbers of bilingual Occupational Therapists in Oregon
 - Strengths cross-cut colleges and divisions:
 - Lifespan approaches (prenatal to end of life)
 - Focus on structural constraints
 - Social justice and health disparities
 - Leadership, advocacy, and empowerment
 - Bilingual and bicultural communities

Curriculum Strands Based on WOU Strengths

- Health through the life span
 - Understanding how occupational therapists can be effective in promoting health and assisting clients to live with and overcome disabilities through the life span
- Community and emerging areas of practice
 - A focus on community-based practice and medically underserved populations
- Social justice and health disparities
 - Emphasis on how a professional can become an advocate for change through an understanding of socio-political and structural constraints
- Excellence in practice
 - Moving students from novice with an understanding of theory to entry-level practice and progressing to advanced skills
- Leadership, advocacy and empowerment
 - Emphasis on development of leadership skills and empowering the therapist to be an agent of change in the healthcare environment

Curriculum Features

- 3-year curriculum
- Curriculum focused on the use of occupation as a means of working with clients with a wide variety of disabilities and backgrounds
- Clinical Placements
 - 1st Clinical placement Summer Year 1
 - 2nd Clinical placement Summer Year 2
 - 3rd Clinical placement Fall Year 3
 - Clinical placement continues into Winter Year 3
 - Final Clinical placement Spring Year 3

Projected Curricular Sequence: Year 1

Fall 1	Winter 1	Spring 1	Summer 1
Human Anatomy I (Lab)	Neuroscience II (Lab)	Therapeutic Groups	Level Ib Community Based Practicum
Neuroscience I (Lab)	OT Theories II	Introduction to Applied Research	Evidence Based Practice
OT Theories I	Evaluation and Assessment in OT (Lab)	Clinical Conditions II	Contextual Issues in Practice
Understanding Human Development and Performance	Clinical Conditions I	Study of Human Occupations	Applied Research II
	Movement Analysis (lab)	Clinical Skills	
		Level Ia Clinical Experience	

Curricular Sequence: Year 2

Fall 2	Winter 2	Spring 2	Summer 2
OT Practice in Children and Adolescents (lab)	Practice with Adult Conditions and Rehab	Practice in Geriatrics	Level II fieldwork I
OT Practice in Psychosocial Issues (lab)	Management, Leadership and Supervision	Practice with Assistive Technology	
Level Ic Practice with Children and Adolescents	Advocacy and Health Disparities	Practice in Hands and Orthotics	
Interprofessional Case discussion	Level Id Psychosocial Practice	Interprofessional Case Discussion	
Teaching and Learning	Capstone Proposal Development	Capstone proposal 2 – Completing the Proposal	
Teaching and Learning	Interprofessional Case discussion	Level I Clinical Experience	

Curricular Sequence: Year 3

Fall 3	Winter 3	Spring 3
Level II Fieldwork II Part 1	Level II Fieldwork Part 2	Doctoral Capstone and Experience Part 2
	Doctoral Capstone and Experience Part 1	Doctoral Capstone Project

Finances & Facilities

Occupational Therapy Financial Facts

- Cost analysis is based upon the actual budgets of other OTD programs
- OTD will generate additional revenue for WOU, \$1.5 to 2.7 M annually
 - The revenues are dependent upon cohort sizes
- Additional funds can be used to support other academic programs and student support services
- The SSCM (Student Success and Completion Funding Model) rewards degree production for resident students
- WOU will continue to seek external funding to support program start-up
 - E.g., Congressionally directed spending, state appropriations, foundation funding, private donations, WOU foundation campaign

Cost Analysis for Rollout of OTD

Scenario 1: Cohorts starting at 30

1st Class, Cohort 30

	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	Cumulative
Revenues	-	1,012,422	2,014,596	3,120,532	3,255,639	3,393,266	3,533,489	16,329,943
Expenses	1,414,300	1,786,228	1,932,388	1,981,547	1,943,695	1,981,718	2,020,388	13,060,266
Net	(1,414,300)	(773,806)	82,208	1,138,985	1,311,943	1,411,547	1,513,101	3,269,677
Rev/Exp Ratio	-	0.57	1.04	1.57	1.67	1.71	1.75	1.25

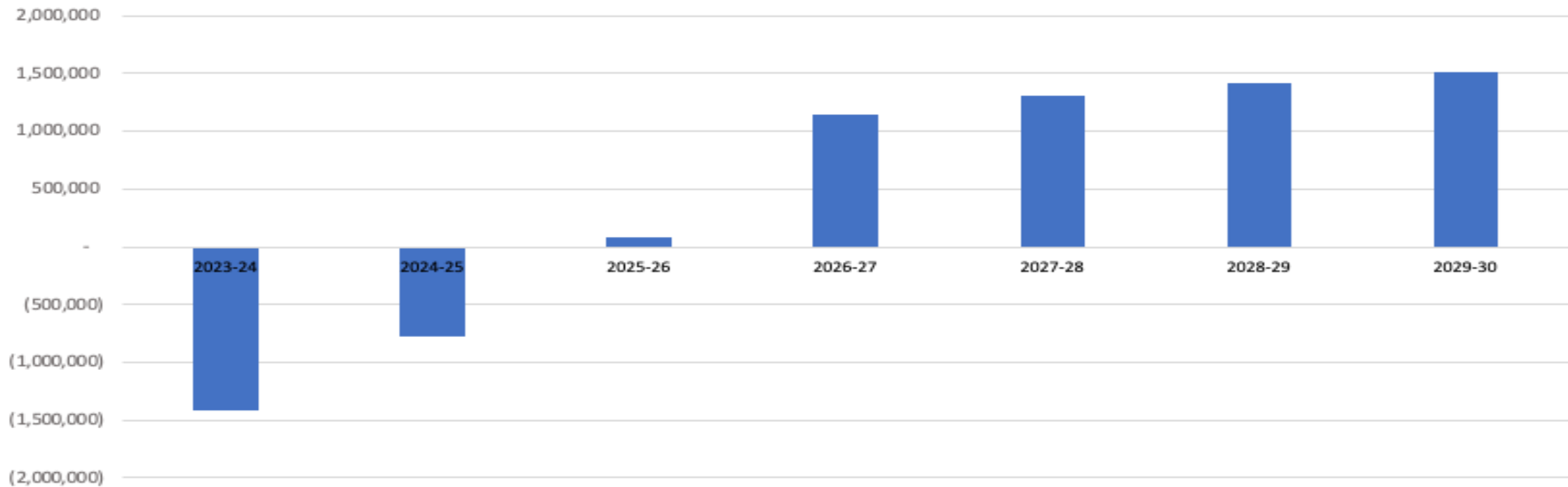
Scenario 2: Cohorts starting at 40

1st Class, Cohort 40

	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	Cumulative
Revenues	-	1,447,582	2,779,816	4,174,322	4,331,568	4,516,313	4,704,541	17,249,601
Expenses	1,414,300	1,786,228	1,932,388	1,981,547	1,943,695	1,981,718	2,020,388	11,039,878
Net	(1,414,300)	(338,646)	847,428	2,192,775	2,387,872	2,534,595	2,684,152	6,209,723
Rev/Exp Ratio	-	0.81	1.44	2.11	2.23	2.28	2.33	1.56

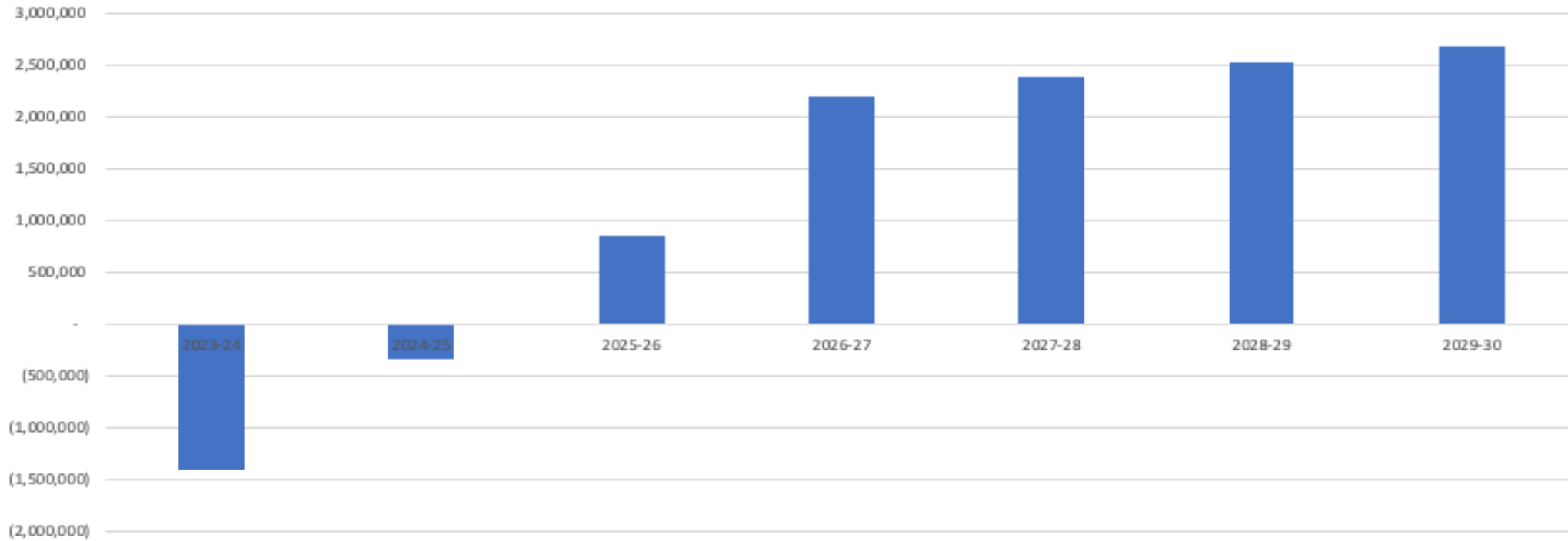
OTD Projected Net Revenue (revenue minus costs; Cohorts of 30)

Projected Annual OTD Net Revenues N=30

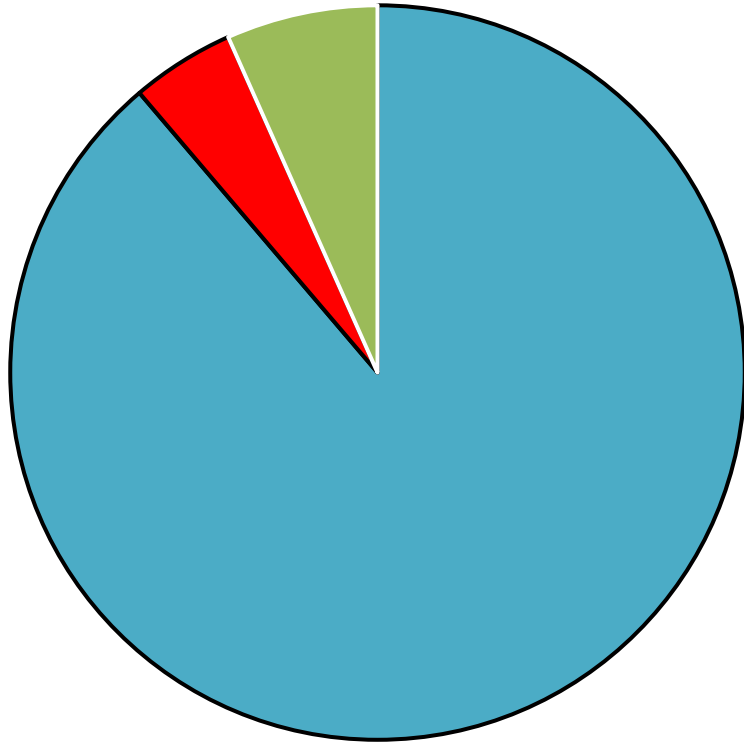


OTD Projected Net Revenue (revenue minus costs; Cohorts of 40)

Projected Annual OTD Net Revenues N=40



Estimated Occupational Therapy Expenses



■ Personnel ■ Service and Supplies (S&S) ■ Facilities

*Occupational Therapy personnel costs expected to represent 88% of the total program cost. This proportion is consistent with the overall WOU budget, as personnel represents 85% of the total WOU budget.

Items Within Each Category

Facilities	Personnel	Services and Supplies
Lab Equipment	Administrator Salary	Accreditation Fees
Lab Start-up	Administrator OPE	Lab Supplies
Lab Maintenance	Faculty Salary	General S&S
Instructional Technology	Faculty OPE	Local travel for clinical placements
	Faculty Recruitment	Accreditation travel
	Lab Tech Salary	Library collections
	Lab Tech OPE	Program development
	Travel for Faculty Development	

Expenses for the building to be paid by the state through its Capital Projects Support Bonds

Facilities

- Digital renderings of building in development
- Renovation and expansion of APSC
- Renovated APSC would house a combination of new programs and current programs
- Secure external funding
 - Capital development funds
 - APSC renovation ~50 M

Proposed Health Sciences Building (APSC)



Questions?

Academic and Student Affairs Committee (ASAC), Proposal for a new Professional Doctorate in Occupational Therapy (OTD)

The Occupational Therapy Doctorate (OTD) program is a three-year, 147-credit, professional doctorate degree that will prepare students for careers as occupational therapists and faculty in Occupational Therapy programs. The program is built upon a foundation of human lifespan development, anatomy and physiology, kinesiology, neuroscience, and human occupations that is complemented by evaluation and assessment, applied research, intervention and rehabilitation, and clinical practice. The program will be a twelve-month program taught using a cohort model and students will be required to attend full-time.

The program will meet all national accreditation requirements as prescribed by the Accreditation Council for Occupational Therapy Education (ACOTE), and has been designed with guidance from Dr. Paula Kramer, an experienced founding director of OTD programs at other universities and former ACOTE President. The sixty-one learning outcomes required of all ACOTE accredited programs will be delivered by forty-two courses and four supervised clinical experiences. The program curriculum is mapped to every learning outcome, and the faculty and facilities will meet or exceed all ACOTE requirements. The Program Director will need to be approved by ACOTE, further ensuring the expertise and capacity to be fully accredited. The stringent nature of ACOTE Accreditation ensures that the WOU OTD program will be of high quality.

The OTD program prepares individuals to assist patients limited by physical, cognitive, psychosocial, mental, developmental, and learning disabilities, as well as adverse environmental conditions, to maximize their independence and maintain optimum health through a planned mix of acquired skills, performance motivation, environmental adaptations, assistive technologies, and physical agents. Occupational Therapy includes instruction in the basic medical sciences, psychology, sociology, patient assessment and evaluation, standardized and non-standardized tests and measurements, assistive and rehabilitative technologies, ergonomics, environmental health, special education, vocational counseling, health education and promotion, and professional standards and ethics.

The courses will be delivered on the Monmouth or the WOU: Salem campuses and clinical placements will occur at hospitals, clinical therapy offices, long term care communities, skilled nursing facilities, and other clinical settings where licensed occupational therapists provide patient care. The primary clinical sites will be in the mid and lower Willamette Valley and Oregon coast. Technology will be utilized to enhance the student learning and applied research will be hallmarks of this program.

The OTD program will focus on enrolling Oregon students but will enroll qualified students from outside the state. If this program is approved, we anticipate creating a formal pathway for qualified WOU undergraduates into the OTD program. This pathway may operate as an early admit, preferential admit, or some other similar program. As with all other WOU programs, the OTD program will make a deliberate attempt to recruit and

enroll students from all backgrounds, with particular attention paid to students from underserved communities. The WOU OTD program will also look to develop a bilingual initiative similar to the nationally recognized WOU Bilingual Teacher Scholars Program.

The program will primarily offer clinical placements in the state of Oregon, increasing the likelihood that the program will improve the availability of occupational therapists throughout the mid-Willamette Valley, the coast, and rural areas in particular. Being an emerging Hispanic Serving Institution, WOU is well positioned to recruit Latinx students into the OTD program, which will also increase diversity in Oregon health professions which in turn will improve health care accessibility to Spanish-speaking populations in Oregon.

The WOU program will serve a region of Oregon that is not being actively served by the one private university that has an OTD program. The planned pro-bono clinic on the WOU campus will serve residents of Polk County who would not otherwise have access to affordable occupational therapy. WOU will focus on enrolling students from the current WOU enrollment footprint and on serving all communities within the main WOU enrollment footprint. Related to WOU's rural location, this program will be well positioned to serve rural communities and support health care accessibility in rural Oregon.

According to the Oregon Employment Department's September 2021 report on "High Wage, High Demand Occupations," occupational therapists are one of the top high wage and high demand occupations in Oregon. A November 3, 2021, search of available jobs in Oregon listed by Indeed.com found 446 openings for licensed occupational therapists. Jobs were available across the state and included local clinics, hospitals, assisted living centers, and rehabilitation centers. The lack of occupational therapists has a detrimental social and welfare impact on communities across the state. Furthermore, common barriers for medically underserved populations (MUPs) in Oregon include economic, cultural and linguistic barriers. The WOU OTD program will increase the number of Spanish-speaking and Latinx occupational therapists in Oregon, which will further diversify the health care workforce and provide greater accessibility to MUPs.

The OTD program's design includes an on-site pro-bono clinic, its emphasis on enrolling and graduating Oregon residents, especially those from under-served communities, will directly and indirectly support the creation and strengthening of an ethos of service and community engagement. The OTD provides a meaningful opportunity for WOU to deepen connections with the Monmouth/Independence and Salem communities by providing a facility and content to support wellness training and occupational therapy for low-income residents. Most of the OTD faculty will be licensed occupational therapists and some of them will need a requisite number of hours in order to maintain their nationally recognized specializations (e.g., pediatrics, neurologic, geriatric, public health, etc.). The pro-bono clinical will not only benefit the community, but also provide opportunities for OTD faculty to complete these hours and for OTD students to gain further clinical experiences.

The proposed Professional Doctorate in Occupational Therapy received Faculty Senate Approval on April 12, 2022, and the proposal is supported by the provost. Upon approval

by the WOU Board of Trustees, HECC approval will be sought. Pending HECC approval, we will request authorization from the NWCCU to offer this program.

COMMITTEE RECOMMENDATION:

It is recommended that the Western Oregon University Board of Trustees approve the introduction of a new Professional Doctorate in Occupational Therapy as included in the docket material.



Proposal for a New Academic Program

Institution: Western Oregon University

College/School: TBD

Department/Program Name: TBD

Degree and Program Title: Occupational Therapy Doctorate

1. Program Description

- a. Proposed Classification of Instructional Programs (CIP) number.

CIP Code 51.2306

Title: Occupational Therapy/Therapist.

Definition: A program that prepares individuals to assist patients limited by physical, cognitive, psychosocial, mental, developmental, and learning disabilities, as well as adverse environmental conditions, to maximize their independence and maintain optimum health through a planned mix of acquired skills, performance motivation, environmental adaptations, assistive technologies, and physical agents. Occupational Therapy includes instruction in the basic medical sciences, psychology, sociology, patient assessment and evaluation, standardized and non-standardized tests and measurements, assistive and rehabilitative technologies, ergonomics, environmental health, special education, vocational counseling, health education and promotion, and professional standards and ethics.

- b. Brief overview (1-2 paragraphs) of the proposed program, including its disciplinary foundations and connections; program objectives; programmatic focus; degree, certificate, minor, and concentrations offered.

The Occupational Therapy Doctorate (OTD) program is a three-year professional doctorate degree that will prepare students for careers as occupational therapists and faculty in Occupational Therapy programs. The program is built upon a foundation of human lifespan development, anatomy and physiology, kinesiology, neuroscience, and human occupations that is complemented by evaluation and assessment, applied research, intervention and rehabilitation, and clinical practice.

The program will meet all national accreditation requirements as prescribed by the Accreditation Council for Occupational Therapy Education (ACOTE). The sixty-one learning outcomes required of all ACOTE accredited programs will be delivered by forty-two courses and four supervised clinical experiences.

- c. Course of study – proposed curriculum, including course numbers, titles, and credit hours.

The curriculum is comprised of 147 quarter credits of graduate course work. Below is the 3-year curriculum sequence:

Fall I		Winter I		Spring I		Summer I	
	CR		CR		CR		CR
OTD 701 OT Theories I	3	OTD 702 OT Theories II	3	OTD 707 Clinical Conditions II-	3	OTD 722 Level Ib Community based experience	2
OTD 703 Understanding Human Development and Performance	3	OTD 720 Movement Analysis (lab)	4	OTD 710 Clinical Skills	2	OTD 736 Evidence based practice	3
OTD 711 Human Anatomy I (Lab)	4	OTD 706 Clinical Conditions I	3	OTD 721 Level Ia Clinical Experience	1	OTD 737 Applied research III	3
OTD 730 Neuroscience I (Lab)	4	OTD 715 Evaluation and Assessment in OT (lab)	4	OTD 735 Introduction to applied research	3	OTD 741 Contextual Issues in OT Practice	4
		OTD 731 Neuroscience II (lab)	3	OTD 751 Therapeutic groups-	4		
				OTD 705 Study of Human Occupations	3		
Total	14	Total	17	Total	16	Total	12
Fall II		Winter II		Spring II		Summer II	
	CR		CR		CR		CR
OTD 723 Level Ic Practice with Children and Adolescents	1	OTD 724 Level Id Practical Exp w/Clients w/Psychosocial	1	OTD 725 Level Ie Practical Exp w/Adults and Rehab Clients	1	OTD 792 Level Ila fieldwork I	12
OTD 742 OT Practice in Pediatrics and Adolescents (lab)	4	OTD 744 Practice with Adults and Rehab	4	OTD 745 Interventions w/Hands, Orthotics & Innovative Technology	4		
OTD 743 OT in Psychosocial practice (lab)	4	OTD 761 Interprofessional Case discussion 2	1	OTD 762 Interprofessional Case Discussion 3	1		
OTD 750 Teaching and Learning	3	OTD 785 Advocacy and Professional Responsibilities	2	OTD 780 Theoretical & Professional Reasoning in OT	3		
OTD 760 Interprofessional Case discussion 1	1	OTD 790 Introduction to Capstone 1	3	OTD 791 Capstone proposal Development 2	3		
		OTD 768 Management, Leadership and Supervision	3	OTD 734 Practice in Geriatrics & Productive Aging	4		
Total	13	Total	14	Total	16	Total	12
Fall III		Winter III		Spring III			
	CR		CR		CR		CR
OTD 793 Level Iib fieldwork II Part I	9	OTD 793 Level Iib fieldwork Part 2	6	OTD 794 Doctoral Capstone Experience Part 2	11		
		OTD 794 Doctoral Capstone Experience Part I	6	OTD 795 Doctoral Capstone Project	1		
Total	9	Total	12	Total	12		

d. Manner in which the program will be delivered, including program location (if offered outside of the main campus), course scheduling, and the use of technology (for both on-campus and off-campus delivery).

The courses will be delivered on the Monmouth or the WOU: Salem campuses and clinical placements will occur at hospitals, clinical therapy offices, long term care communities, skilled nursing facilities, and other clinical settings where licensed occupational therapists provide patient care. The primary clinical sites will be in the mid and lower Willamette Valley and Oregon coast. Technology will be utilized to enhance the student learning and applied research will be hallmarks of this program. This will be a full-time, twelve-month program.

e. Adequacy and quality of faculty delivering the program.

ACOTE accreditation standards mandate that the program must have at least three full-time equivalent faculty positions.¹ Faculty must have academic and experiential qualifications that meet program objectives, documented expertise in their area(s) of teaching and knowledge of content delivery methods.² All full-time core faculty who are occupational therapy practitioners and teaching occupational therapy content must hold a doctoral degree awarded by an institution that is accredited by USDE-recognized institutional accrediting agency.³ The doctoral degree is not limited to a Doctorate in

¹ ACOTE Standards and Interpretive Guide, 2020, Standard A.2.2.

² ACOTE Standards and Interpretive Guide, 2020, Standard A.2.3.

³ ACOTE Standards and Interpretive Guide, 2020, A.2.7.

Occupational Therapy.³ These full-time core faculty must also be currently licensed or otherwise regulated in the state as an occupational therapist.⁴ At least 50% of full-time core faculty must have a post-professional doctorate.³

f. Adequacy of faculty resources – full-time, part-time, adjunct.

The OTD faculty will be primarily full-time with adjunct faculty used to bring in specific areas of expertise to complement the core full-time faculty. ACOTE requirements specify that the core faculty be responsible for the academic and clinical preparation of the students in the program. The WOU OTD program will be housed in a new building or on the WOU:Salem campus that will include faculty offices, instructionally-supportive technology, clinical research space and other instructional space to support student learning.

Other staff.

g. Adequacy of facilities, library, and other resources.

There are two significant fiscal elements: facility and operational. The OTD will require instructional and research space that WOU currently lack. The two options are renovation of a current space or construction of a new facility. Accreditation requirements mandate that faculty in the OTD program are active researchers. Supporting the research activities of the new OTD faculty is an opportunity to create collaborative and interdisciplinary research space that can also support the research activities of WOU faculty and students in other areas, including but not limited to public health, exercise science, special education, teacher education, rehabilitation counseling, gerontology, psychology, and social sciences. The research facilities needed to support the faculty and students in the OTD program will not be as extensive as those required in traditional research-intensive settings since the OTD research will be more application focused.

The library collections have recently been increased to support the research and instructional needs of faculty and students in health sciences and they will be increased more when faculty are hired. The program's increased use of technology will also require the addition of a dedicated staff person to support the technology needs.

h. Anticipated start date.

The program is expected to start Fall term 2024.

2. Relationship to Mission and Goals

- a. Manner in which the proposed program supports the institution's mission, signature areas of focus, and strategic priorities.

Adding an Occupational Therapy Doctorate program to WOU is strongly aligned with the WOU Strategic Plan in many ways. The most critical are noted below.

- 1.1.1 Providing a campus environment that enhances learning and the development of the whole person.
- 1.3.3 Support curricular innovation and accountability.
- 2.1.2 Increase support for programs and activities that demonstrate and inspire academic excellence.
- 2.4.1 Promote academic array that provides distinctive, high-quality programs.

⁴ ACOTE Standards and Interpretive Guide, 2020, A.2.6.

- 3.1.1 Adopt experiential learning guidelines and align high-impact practices with these guidelines.
- 3.2.1 Increase support for student engagement in community service.
- 3.2.4 Create and enhance educational partnerships with local communities, particularly for underrepresented student groups.
- 4.2.1 Develop institutional research capacity.
- 5.1.3 Support growth of academic programs to include new and innovative degrees and certificates.

- b. Manner in which the proposed program contributes to institutional and statewide goals for student access and diversity, quality learning, research, knowledge creation and innovation, and economic and cultural support of Oregon and its communities.

Institutional goals:

The OTD program supports multiple elements of the WOU strategic plan including academic excellence, community engagement (pro-bono clinic for local residents and students lacking health insurance), and sustainability. The OTD program will expand WOU academic offerings and create research opportunities for faculty and students. Various new technologies to support instruction will be tested in the program. Those that are effective can be applied to other academic programs and facilities on campus.

Statewide goals:

The OTD program will actively support multiple HECC strategies outlined in the Spring 2016 Strategic Plan. These include:

- Strategy 1: Goal-setting. The WOU OTD program will create a synergistic impact on related WOU undergraduate programs. The OHSU Nursing program was a catalyst to a growth in WOU's Biology and Exercise Science undergraduate programs. As a campus that has continually achieved higher retention and graduation rates for Latinx students, the expected increase in student enrollment in biology, behavioral sciences, exercise science, and public health at WOU will result in an increase in the number of Latinx students who enroll and complete their degrees as well. WOU will actively recruit Latinx and other under-represented students to the current undergraduate degree programs as well as to the OTD program.
- Strategy 3: Pathways. WOU has created an external advisory committee that includes leading health practitioners and major health care providers. The committee will work with WOU to create an OTD program that strongly connects WOU students and faculty with the employers and communities so that students have the most effective and efficient pathways leading to successful transition into their occupational therapy career.
- Strategy 5 Affordability. The WOU program will have a tuition that is projected to be more than \$5,000 below the annual cost of the two established programs at private universities in Oregon.
- Strategy 6 Economic and Community Impact. The WOU program will serve a region of Oregon that is not being actively served by the one private university that has an OTD program. The planned pro-bono clinic on the WOU campus will serve residents of Polk County who would not otherwise have access to affordable occupational therapy. WOU will focus on enrolling students from the current WOU enrollment footprint and on serving all communities within the main WOU enrollment footprint.

Related to WOU's rural location, this program will be well positioned to serve rural communities and support health care accessibility in rural Oregon.

The OTD program will focus on enrolling Oregon students and will primarily offer clinical placements in the state of Oregon. Doing so will increase the likelihood that the program will improve the availability of occupational therapists throughout the mid-Willamette Valley, the coast, and rural areas in particular. Being an emerging Hispanic Serving Institution, WOU is well positioned to recruit Latinx students into the OTD program, which will also increase diversity in Oregon health professions which in turn will improve health care accessibility to Spanish-speaking populations in Oregon.

c. Manner in which the program meets regional or statewide needs and enhances the state's capacity to:

i. improve educational attainment in the region and state;

The OTD program at WOU will increase student and family awareness of this degree and career. As a university that effectively serves low-income, first-generation, and minority students from all Oregon communities, WOU's OTD program will increase student and family awareness and aspirations. This increased awareness will support higher academic aspirations and attainment. The research facilities that are required for program accreditation will be available for use by other WOU faculty. Nearly all WOU faculty who are active in research utilize undergraduate students in their activities. It has been well established that students who engage in high-impact activities, such as research, are more likely to succeed in college.

ii. respond effectively to social, economic, and environmental challenges and opportunities; and

According to the Oregon Employment Department⁵ occupational therapists are one of the top high wage and high demand occupations in Oregon. A November 3, 2021, search of available jobs in Oregon listed by Indeed.com found 446 openings for licensed occupational therapists. Jobs were available across the state and included local clinics, hospitals, assisted living centers, and rehabilitation centers. The lack of occupational therapists has a detrimental social and welfare impact on communities across the state. Furthermore, common barriers for medically underserved populations (MUPs) in Oregon include economic, cultural and linguistic barriers. The WOU OTD program will increase the number of Spanish-speaking and Latinx occupational therapists in Oregon, which will further diversify the health care workforce and provide greater accessibility to MUPs.

iii. address civic and cultural demands of citizenship.

The OTD program's design to include an on-site pro-bono clinic, its emphasis on enrolling and graduating Oregon residents, especially those from under-served communities, will directly and indirectly support the creation and strengthening of an ethos of service and community engagement.

The OTD provides a meaningful opportunity for WOU to better connect with the Monmouth/Independence and Salem communities by providing a facility and content to support wellness training and occupational therapy for low-income

⁵ Oregon Employment Department "High Wage, High Demand Occupations" September 2021

residents. Most of the OTD faculty will be licensed occupational therapists and some of them will need a requisite number of hours in order to maintain their nationally recognized specializations (e.g., pediatrics, neurologic, geriatric, public health, etc.). The pro-bono clinical will not only benefit the community, but also provide opportunities for OTD faculty to complete these hours and for OTD students to gain further clinical experiences.

3. Accreditation

- a. Accrediting body or professional society that has established standards in the area in which the program lies, if applicable.

ACOTE (Accreditation Council for Occupational Therapy Education)

- b. Ability of the program to meet professional accreditation standards. If the program does not or cannot meet those standards, the proposal should identify the area(s) in which it is deficient and indicate steps needed to qualify the program for accreditation and date by which it would be expected to be fully accredited.

We have designed the program with guidance from Dr. Paula Kramer, experienced founding director of OTD at other universities and former ACOTE President, to comply with all ACOTE standards including the 61 learning outcomes. The program curriculum is mapped to every learning outcome, the faculty and facilities will meet or exceed all ACOTE requirements. The Program Director will need to be approved by ACOTE, further ensuring the expertise and capacity to be fully accredited. The stringent nature of ACOTE Accreditation ensures that the WOU OTD program will be of high quality.

- c. If the proposed program is a graduate program in which the institution offers an undergraduate program, proposal should identify whether or not the undergraduate program is accredited and, if not, what would be required to qualify it for accreditation.

N/A

- d. If accreditation is a goal, the proposal should identify the steps being taken to achieve accreditation. If the program is not seeking accreditation, the proposal should indicate why it is not.

WOU will follow the prescribed ACOTE accreditation path which involves the following steps:

- WOU Academic Review including approval by Faculty Senate and WOU Board of Trustees
- Approval by Provost Council and HECC
- Approval by NWCCU
- Approval by ACOTE

4. Need

- a. Anticipated fall term headcount and FTE enrollment over each of the next five years.

The proposed three-year program at WOU would initially enroll new cohorts of 30 students. The OTD program will support greater research activity by the WOU faculty and provide undergraduate students with meaningful research and internship opportunities.

Year	Cohort Size	Total Enrollment
2024-25	30	30

2025-26	30	59
2026-27	30	88
2027-28	40	98
2028-29	40	108

b. Expected degrees/certificates produced over the next five years.

Year	Number of Degrees
2024-25	0
2025-26	0
2026-27	29
2027-28	29
2028-29	29

c. Characteristics of students to be served (resident/nonresident/international; traditional/nontraditional; full-time/part-time, etc.).

The OTD program will focus on serving Oregon students but will enroll qualified students from outside the state. The university anticipates creating a formal pathway for qualified WOU undergraduates into the OTD program. This pathway may operate as an early admit, preferential admit, or some other similar program. As with all other WOU programs, the OTD program will make a deliberate attempt to recruit and enroll students from all backgrounds, with particular attention paid to students from underserved communities. The WOU OTD program will also look to develop a bilingual initiative similar to the nationally recognized WOU Bilingual Teacher Scholars Program.

The program will be taught using a cohort model and students will be required to attend full-time.

d. Evidence of market demand.

Oregon has one ACOTE accredited OTD program (Pacific University) and one additional university has applied for accreditation from ACOTE to initiate an OTD program (Western University of Health Sciences), both of which are private universities. Pacific University's program is well established and accepts approximately 40 students per year. Western University of Health Science is a new program that has just begun accepting applications for their inaugural class. Washington state has two OTD programs, both in private universities. The University of Puget Sound has been granted Candidacy by the ACOTE and accepts approximately 36-40 per year into their 3-year OTD program. Whitworth University has applied for accreditation by the ACOTE and is now accepting applications for their 2022-2023 cohort.

In 2016, WOU contracted with STAMATS to do a market analysis and identify high need and high growth areas for graduate programming. The report concluded that "Occupational therapy is a very strong program across the board and, from analysis of just the market forces, is the most likely to be introduced successfully. The overall demand is strong regionally, and the number of providers is limited as are the size of the cohorts the

competitor programs admit.” In 2019, STAMAT estimated that jobs in occupational therapy are expected to increase by 17.6% by 2029.

2020 data produced by the Oregon Health Authority determined that

- Oregon’s population has increased an average of 1.3% each year since 2016. As a result, the Direct Patient Care FTE for occupational therapists has increased 4.5% between 2016 – 2020.
 - By 2020, Oregon was expected to lose between 6.2% - 7.2% of their licensed occupational therapists due to retirement, vocational change, and movement to other states.
 - The population of those 65 years of age and older will grow at over 3 times the rate of those younger than 64 years of age over the next 10 years, further exemplifying that there will be a growing need for occupational therapists.
- e. If the program’s location is shared with another similar Oregon public university program, the proposal should provide externally validated evidence of need (e.g., surveys, focus groups, documented requests, occupational/employment statistics and forecasts).

N/A

- f. Estimate the prospects for success of program graduates (employment or graduate school) and consideration of licensure, if appropriate. What are the expected career paths for students in this program?

According to the U.S. Bureau of Labor Statistics Occupational Outlook Handbook, the demand for occupational therapists is projected to grow by 17 percent from 2020-2030. This is far above the average demand growth rate for other occupations. The projected growth rate of demand for occupational therapists in Oregon is expected to grow much faster (19%+) than the regional average growth rate for other occupations through 2030. Professional licensure to become an occupational therapist requires an OTD awarded from a college or university that is accredited by ACOTE.

5. Outcomes and Quality Assessment

- a. Expected learning outcomes of the program.

Overall, the programs learning outcomes are:

1. Demonstrate the knowledge and skills to be competent occupational therapists,
2. Understanding the importance of promoting health through the life span using meaningful occupations,
3. Be prepared to use appropriate theories to evaluate clients and develop appropriate interventions using therapeutic occupations to improve function performance and quality of life for clients, demonstrating excellence in practice,
4. Be life-long learners,
5. Appreciate the importance of culture, community, health disparities, and sociopolitical issues that affect intervention,
6. Be informed about emerging areas of practice and the significance of community-based services,
7. Be prepared to become leaders and agents of change, empowering therapists and clients alike.

These outcomes are in keeping with the doctoral educational standards of the profession as prescribed by ACOTE guidelines and the curriculum design of the program.

- b. Methods by which the learning outcomes will be assessed and used to improve curriculum and instruction.

A matrix of courses and required learning outcomes will be developed to ensure that students meet all ACOTE required learning outcomes. Formative assessments will include student feedback obtained through the WOU course evaluation process that is conducted each academic term. Summative data will include the national exam pass rate (expected to be 100%), and placement into an occupational therapy or teaching position within six months of graduation (expected to be 95% or higher). ACOTE provides annual data on these figures so WOU will have national and regional benchmarks to use for comparative analysis. Feedback on student preparation will be gathered from all clinical experiences required of students in the program. Students will also provide feedback regarding their clinical placement experiences. It is anticipated that the program will also survey recent graduates to receive qualitative feedback.

- c. Nature and level of research and/or scholarly work expected of program faculty; indicators of success in those areas.

ACOTE Accreditation requirements mandate that faculty in the OTD program are active researchers. Evidence of this required activity will include the number of peer-reviewed scholarly articles published, number of professional presentations made at regional and national scholarly and professional conferences; and the number of OTD students who publish or present their work.

6. Program Integration and Collaboration

- a. Closely related programs in this or other Oregon colleges and universities.

There is one current ACOTE accredited OTD program in Oregon (Pacific University). Linn-Benton Community College (LBCC) has an ACOTE accredited OT associate program.

- b. Ways in which the program complements other similar programs in other Oregon institutions and other related programs at this institution. Proposal should identify the potential for collaboration.

ACOTE requirements for accreditation create OTD programs that are very similar. WOU has a dual enrollment agreement with LBCC. Furthermore, WOU will work with the LBCC program to create an articulated pathway from the OT associate degree to a WOU Bachelor's degree that is aligned with the OTD entrance requirements. WOU will continue to collaborate with Pacific University. WOU will offer social inequities, rural health, and gerontology as its point of unique training, which is complementary to Pacific University.

- c. If applicable, proposal should state why this program may not be collaborating with existing similar programs.

Professional doctorate programs like the OTD program are designed to provide a very rigorous academic experience. The four clinical rotations add time demands that further limit the opportunity for students to collaborate with other programs. Clinical faculty in the program are required to have active Occupational Therapy licenses. This requirement greatly limits their availability to collaborate with other colleges and universities.

- d. Potential impacts on other programs.

Given accreditation requirements, the OTD coursework will generally be taught by new faculty who are licensed occupational therapists and have a doctorate in the area of occupational therapy or closely related field, therefore the direct teaching requirements are not likely to affect current programs. However, there could be indirect impacts and opportunities for existing undergraduate programs, the Biology Department, Health and Exercise Sciences Division, and Behavioral Sciences Division. We have previously convened a Faculty Advisory Taskforce comprised of faculty from the above academic units to discuss impacts and opportunities.

7. External Review

If the proposed program is a graduate level program, follow the guidelines provided in *External Review of New Graduate Level Academic Programs* in addition to completing all of the above information.

This graduate level program will be externally accredited, which will serve as the program's mechanism for external review.

OTD Budget Outline

The OTD program would be a new program and would require additional resources to set up the program and sustain it for the first two years. Beginning in year 3, the program will be self-sustaining and will also provide new revenue to WOU. The cost analysis included below is based on actual budgets of other OTD programs. The revenues are dependent on cohort sizes and the assumption that the OTD tuition rates will be at least \$5,000 below the annual cost of the two established programs at private universities in Oregon. In the cost analysis included below, two different cohort scenarios are presented: 1) cohorts starting at 30, and 2) cohorts starting at 40. Exact cohort sizes will be guided by ACOTE during the accreditation process and will be dependent on faculty hires.

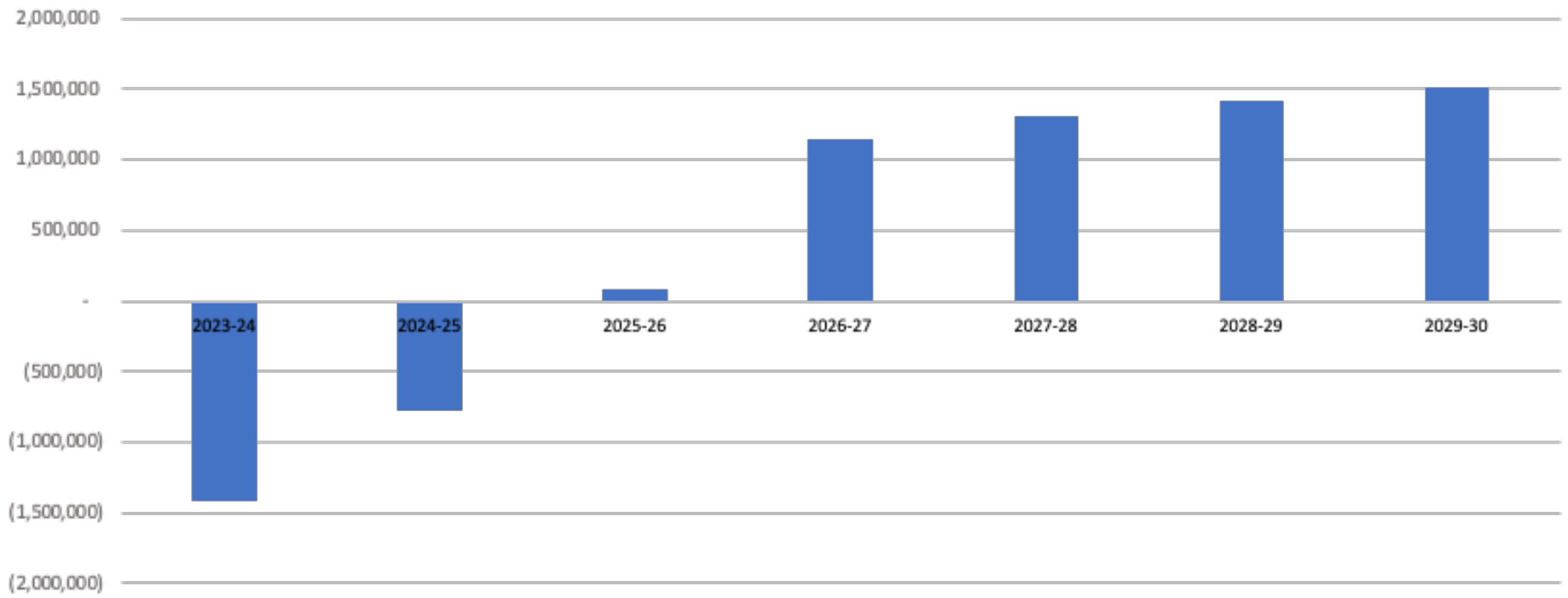
Funds to support program start-up will be sought from external sources including congressionally directed spending, state appropriations, foundation funding, private donations, and the WOU foundation campaign. Expenses for building or renovation costs to be paid by the state through its Capital Projects Support Bonds. Expenses for the program included in the table below include personnel, service and supplies, and facilities. The personnel costs represent 88% of the total program cost. This is consistent with the overall WOU budget, as personnel represents 85% of the total WOU budget.

Cost Analysis for the Rollout of the OTD program

Scenario 1: Cohorts starting at 30

	1st Class, Cohort 30							
	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	Cumulative
Revenues	-	1,012,422	2,014,596	3,120,532	3,255,639	3,393,266	3,533,489	16,329,943
Expenses	1,414,300	1,786,228	1,932,388	1,981,547	1,943,695	1,981,718	2,020,388	13,060,266
Net	(1,414,300)	(773,806)	82,208	1,138,985	1,311,943	1,411,547	1,513,101	3,269,677
Rev/Exp Ratio	-	0.57	1.04	1.57	1.67	1.71	1.75	1.25

Projected Annual OTD Net Revenues N=30

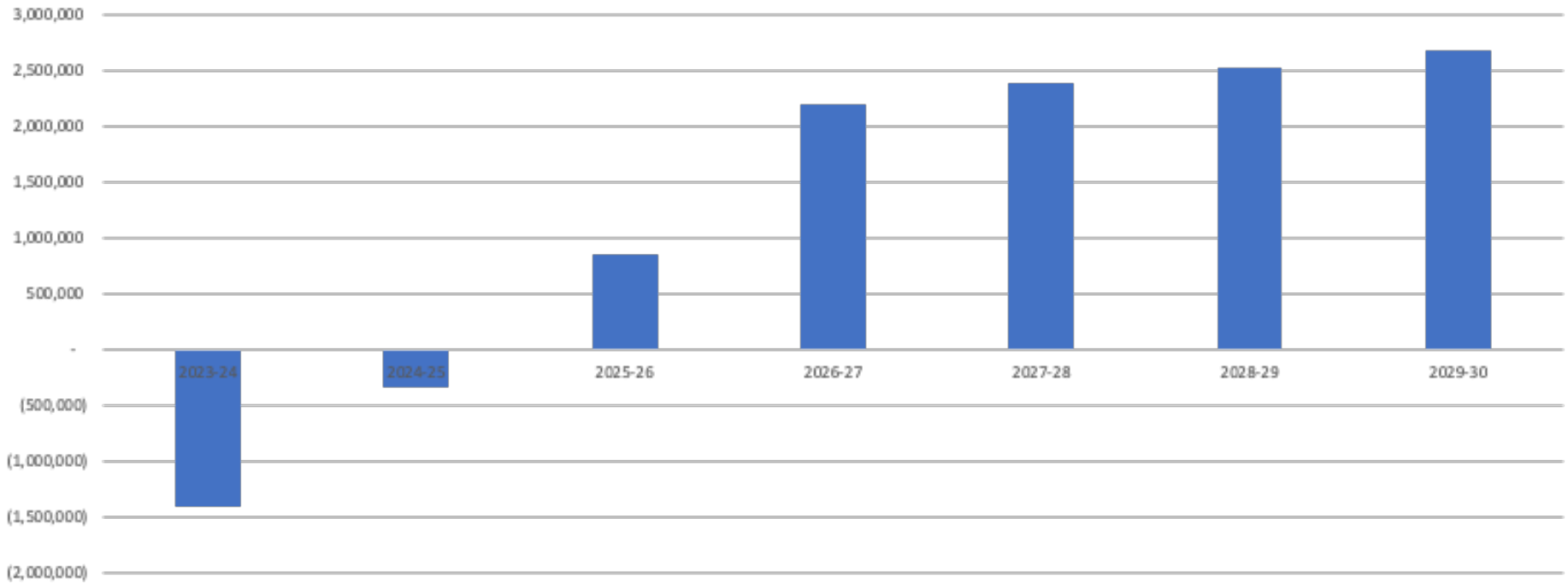


Scenario 2: Cohorts starting at 40

1st Class, Cohort 40

	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	Cumulative
Revenues	-	1,447,582	2,779,816	4,174,322	4,331,568	4,516,313	4,704,541	17,249,601
Expenses	1,414,300	1,786,228	1,932,388	1,981,547	1,943,695	1,981,718	2,020,388	11,039,878
Net	(1,414,300)	(338,646)	847,428	2,192,775	2,387,872	2,534,595	2,684,152	6,209,723
Rev/Exp Ratio	-	0.81	1.44	2.11	2.23	2.28	2.33	1.56

Projected Annual OTD Net Revenues N=40



Finance & Administration Committee (FAC), June 8, 2022

FY23 Proposed Preliminary Budget

Budget Creation Process:

For the past several months, we have been working towards developing the FY23 Preliminary Budget. The overall purpose of the budgeting process was to engage all relevant campus stakeholders in setting fiscal targets and levels of expenditures, allocating resources in conformity with fiscal targets and the University's Strategic Plan, and addressing issues of operational efficiency and performance standards. The process involved having over 30 meetings with stakeholders across campus, including College of Liberal Arts & Sciences, College of Education, divisions of Academic Affairs, Student Affairs, General Counsel, Development and Advancement, Finance and Administration, Athletics, University Housing, Campus Dining, Bookstore, Parking, Student Health & Counseling Center, and Child Development Center. This year, University Budget Advisory Committee (UBAC) took a more active role in determining the enrollment level to base the proposed budget on. As has been done in previous years, an Adjusted FY23 Budget will be brought to the Board in the Fall, when enrollment and state appropriation levels are known.

Education & General (E&G) Fund Component:

The FY23 Education & General Fund totals \$67.735M in revenues and \$73.131M in recurring expenses and transfers. Combined with one-time activities of \$891K, this results in a budget deficit of \$6.287M. Projected beginning FY23 Fund Balance totals \$11.810M, this deficit level would reduce the fund balance to \$5.523M, or 8.15% of revenues by the end of FY23. See the FY23 Education & General Fund Detail worksheet for a comparison the FY23 Proposed Preliminary Budget to the FY22 Budget, as well as FY22 Projection. See the FY23 Education & General Fund Budget worksheet, for the index-level detail.

Revenue Assumptions:

Total Revenues for the FY23 Preliminary Budget are \$67.735M.

Tuition & Fees

- Tuition assumes a 5% UG enrollment decline and flat (0%) GR enrollment from Fall 2021, and then 6% attrition between terms. The University Budget Advisory Committee assisted with determining what enrollment level to build the FY23 Preliminary Budget on and took into consideration many data points. The Director of Admissions shared the positive data that applications (14.9%) and admits (5.5%) are up from the prior year (percentages vary from week to week, these were at the time of the April 28, 2022 UBAC meeting). However, the Director of Financial Aid reported that FAFSAs are down 8% from last year.

UBAC also reviewed housing reservation numbers (which continue to be lower than 2020 and 2021). UBAC also heard from Graduate office and the efforts being done with EAB to better market those programs. Although UBAC is hopeful for enrollment growth as a result of all of the enrollment initiatives that have taken place this year, based on the data available to us at this point, they felt budgeting -5% UG and 0% GR was most prudent at this time, with the understanding that an adjusted budget will be brought back in the fall once actual enrollment is known.

- This results in an assumed 123,262 undergraduate and 8,753 graduate credit hours. Applying the applicable tuition rates as approved at the April 20, 2022 Board of Trustees meeting results in total undergraduate tuition of \$26.813M and graduate tuition of \$4.026M.
- An Education & General Fund Scenarios sheet is provided below as well to provide estimated revenues for the alternative enrollment scenario of 0% UG and 5% GR. A 1% change in enrollment for UG is approximately \$300K in gross revenue, while a 1% change in enrollment for GR is approximately \$40K.
- Summer tuition revenues have been assumed to be approximately the same as the projected current fiscal year actuals (summer tuition crosses two fiscal years, with approximately 15% of revenues recognized in the fiscal year just ending and 85% in the fiscal year beginning). Total summer tuition is budgeted at \$2.311M.
- Other tuition incorporates miscellaneous tuition assessments such as employee discounted tuition or cohort tuition agreements. The budget assumes approximately the same as the projected current fiscal year actuals, \$360K.
- Matriculation fees have been budgeted at \$500K, a slight decline from projected FY22 actuals. Course fees and other fees have been budgeted at \$300K and \$150K respectively, the same as the FY22 Budget.
- Online course fee revenue assumes that 35% of UG enrollment and 80% of GR enrollment will be online, reflecting an assumption that on-campus enrollment will continue to gradually increase. This results in an assumed 57,144 of online course credit hours, for a budget of \$3.029M.
- Fee remission budget has been held at FY22's budgeted amount of \$5.5M, although actual fee remissions for FY22 are projected to be closer to \$5M. Financial Aid has been working closely with RNL to restructure our fee remission awarding, with higher amounts of merit and increasing categories of eligibility. As a result, we expect to see an increase in fee remissions. This is a 16.4% discount rate based on budgeted tuition.
- Net Tuition & Fees total \$31.989M, \$283K less than the FY22 Budget, with the decrease in gross tuition from an assumed -5% UG enrollment offset by an increase in online course fee revenue.

Government Resources & Allocations

- State funding is budgeted at \$31.966M, a \$982K increase from the FY22 Budget. FY23 will be the second year of the biennium, with 49% of PUSF being distributed in year 1 and the remaining 51% distributed in year 2. The budgeted amount is based on the latest projection from HECC, which has not yet been updated for FY22 data (with the Student Success & Completion Model being based on three-year rolling averages).

Other Revenues

- Budgeted Gift Grants and Contracts total \$1.180M, which incorporates a significant increase in grant indirect revenue from the prior year based on increased grant awards, as well as the anticipated reimbursement from the WOU foundation for certain personnel.
- Interest Earnings/Investment, Sales & Services, and Other Revenues are all budgeted at the same level as FY22's Budget, totaling \$2.6M.

Expense Assumptions:

Total Expenses for the FY23 Preliminary Budget are budgeted at \$69.633M.

Personnel

- Personnel budget totals \$59.728M, \$2.483M more than the FY22 Budget.
- Faculty Salaries are budgeted at \$18.423M, which is reflective of:
 - 5 new T/TT lines in Business, Computer Science, Special Education, Deaf & Professional Studies, & Social Sciences.
 - Rostered faculty salaries have been updated as outlined in the WOUFT Collective Bargaining Agreement, which includes annual step increases, 0.5% COLA February 2022 (not reflected in FY22 Budget) and 1.5% COLA September 2022. Promotions (resulting in 4 step increases) were also incorporated into the budget for 19 faculty.
 - Approximately \$313K of budget savings were generated from the remaining Article 15 T/TT reductions.
 - An increase in the NTT pool average salary rate of 3.8% (\$5,500/month). The WOUFT Collective Bargaining Agreement outlines COLAs of 3.5% February 2022 (not reflected in FY22 Budgeted numbers) and 2.75% effective September 2022.
 - An approximate 7 FTE decrease in NTT pool allocations based on realizing the remainder of Article 15 savings and other efficiencies.
- Budgeted amount for unclassified staff totals \$10.126M:
 - The 1% COLA effective January 1, 2022 and any other roster changes are incorporated, but does not assume any raises for FY23. A 1% COLA for unclassified would cost approximately \$137K with OPE.

- Incorporates new positions including Benefits Navigator (funded by new state appropriation), President Office support staff, Admissions Office Transfer Specialist Assistant Director, Business Dept Recruitment & Retention Advisor, Education Advisor, an increase in pay/FTE for Associate Provost position resulting from a reorganization, and an increase in both DEI positions to full year (were only budgeted for partial year in FY22's Budget).
- Faculty & Unclassified Supplemental pay is budgeted at \$571K. This category is largely reflective of stipends paid to faculty and unclassified staff, but also includes temporary employee and allowance funds.
- Budgeted amount for classified staff totals \$6.646M:
 - Incorporates COLAs according to the SEIU Collective Bargaining Agreement of 3.1% effective January 1, 2022 (not reflected in FY22 Budget) and 2.5% effective July 1, 2022. Also reflects salary selective changes and regular step increases.
 - Incorporates new positions including an Admissions Slate Analyst and Registrar Services Specialist (OS2).
- Classified Pay is budgeted at \$260K and includes \$50K budgeted for longevity pay differential. This category includes pay for differentials, overtime, and temporary employees.
- Student pay is budgeted at \$1.898M and reflects some internal reallocation of budgetary funds as well as an additional \$150K of budgeted student pay.
- Budgeted Other Payroll Expense (OPE) totals \$21.804M. This is comprised of multiple components – health insurance (which is budgeted at a flat annual rate of \$17,004 per eligible individual), retirement (which is budgeted at a composite percentage of 27.5% applied to each employees' specific budgeted pay), and other rate of 8.15% (FICA, etc.).

Services & Supplies (S&S)

- Services & Supplies net budget totals \$9.716M. With Services & Supplies decreasing approximately \$228K, and internal sales increasing approximately \$78K from FY22's budget.
 - S&S divisional budgets were held at the same level as the FY22 Budget (with some Divisions reallocating funds internally).
 - \$382K for the EAB Contract was moved from a recurring S&S item to a one-time item (based on a three-year contract).
 - A correlating \$200K increase in indirect grant spending was budgeted (in line with the grant indirects policy).
 - \$45K was added to the faculty development budget according to the CBA.
 - Internal Sales were increased by \$200K from General Admin Overhead (due to expected increased auxiliary activity), and other miscellaneous reallocations.

Capital Expense

- Capital Expense (Library and University Computing Solutions purchases) is budgeted at \$190K, reflecting some slight internal reallocations of budgetary funds.

Net Transfer Assumptions:

Total Net Transfers are budgeted at \$3.498M.

- Athletics Subsidy is increased by \$198K to \$3.177M as a result of increasing men's soccer coaches to be budgeted for a full year (only partially budgeted in FY22's Budget), and adding two new positions, a part time sports performance coach and an athletic trainer.
- Other transfers of \$150K subsidy to the Child Development Center and \$175K transfer for SELP funding match are budgeted at the same levels as FY22.

Other Activity Assumptions:

Total Other Activities are budgeted at \$891K.

- One-time activities budgeted are inclusive of \$268K for Banner Financial Aid implementation, \$72K for the RNL contract to optimize financial aid, \$382K for the EAB contract, and \$169K for Freedom Center, Stitch Closet, and President's relocation.

Auxiliary Component:

The auxiliary component is composed of Athletics, Housing, Dining, Parking, Conference Services, Bookstore, Student Health & Counseling Center (SHCC), Child Development Center (CDC), and other minor operations. The net budget deficit for all Auxiliaries (excluding IFC) totals \$690K. See the FY23 Designated Operations, Service Departments, & Auxiliary Enterprises Budgets (excluding Athletics & IFC) worksheet, as well as the FY23 Athletics (Non-IFC) Budgets worksheet, for the index-level detail.

University Housing:

University Housing comprises approximately \$6.004M, or 40%, of budgeted auxiliary expenses.

- University Housing expects to break even between revenues and expenses for FY23.
- University Housing's revenue budget totals \$6.012M and is built on an assumed 735 room-paying residents living in Housing between Ackerman, Heritage, Landers, and Arbor Park. This also reflects \$410K of revenue from Family housing, \$350K from Conferences, \$110K from internal sales, and other misc. activity.

- Total expenses and transfers are budgeted at \$6.011M (inclusive of a \$1.412M transfer out to debt service):
 - Personnel budget totals \$1.294M and is reflective of a reorganization.
 - Supplies & Services budget totals \$3.485M, of which \$1.252M is the interest portion of the bond debt payment.

Campus Dining:

Campus Dining comprises approximately \$3.584M, or 24%, of budgeted auxiliary expenses.

- Campus Dining's budget totals a \$85K deficit for the year, with plans to cover from fund balance.
- Campus Dining's budgeted revenues total \$3.498M, based on an assumed 600 meal plans for Valsetz (since residents living in Arbor Park are not required to purchase a meal plan). The budget also incorporates projected Café Allegro revenues of \$150K, \$500K of external conference revenue, \$230K of internal sales. Campus Dining is also hoping to lease the Grill and Deli space in the Werner University Center, resulting in additional revenue.
- Personnel for Campus Dining is budgeted at \$1.912M and includes \$412K of student labor.
- Services & Supplies for Campus Dining are budgeted at \$1.492M, which includes \$769K of food costs.

Student Health & Counseling Center (SHCC):

Student Health & Counseling Center (SHCC) comprises approximately \$1.773M, or 12%, of budgeted auxiliary expenses.

- SHCC has a \$300K budget deficit, with plans to cover this from fund balance.
- Enrollment fees are budgeted at \$1.228M. This assumes 2,800 students will pay the fee fall term with 6% attrition for winter and spring, at the Board approved rate of \$154. The health service fee is assessed at the first credit of in-person courses, and can be opted into for service as well.
- Overall, SHCC revenue is budgeted at \$1.365M, including other miscellaneous revenues.
- Personnel expense budget totals \$1.138M.
- Services & Supplies budget totals \$528K.

Athletics:

Athletics (excluding Incidental Fee component) comprises approximately \$4.642M, or 31%, of budgeted auxiliary expenses.

Athletics receives funding from several sources including Education & General Fund, Lottery, Tickets & Concessions, and Special Projects.

- Lottery funding is budgeted at \$1.3M, based on actuals received in FY22.
- Tickets and concessions revenues of \$31K are included.
- Personnel budget totals \$2.958M and is reflective of personnel changes noted in E&G's transfer out section for athletics.
 - Increasing men's soccer coaches to be budgeted for a full year (only partially budgeted in FY22's Budget), and adding two new positions, a part time sports performance coach and an athletic trainer.
- Athletics budget also incorporates the \$3.177M transfer in from E&G.

Parking:

Parking comprises approximately \$400K, or 3%, of budgeted auxiliary expenses.

- Parking's budget totals a deficit of \$48K for the year, with plans to cover from fund balance.
- Sales & Services revenues are budgeted at \$120K, which reflects an assumed increase in parking pass sales from FY21 (although still significantly less than the approximate \$300K generated in FY20).
- Parking's personnel totals \$190K, which includes partial FTE of Campus Public Safety personnel to provide relief to the E&G budget.

Overall Auxiliaries:

Bookstore and Child Development Center are other significant auxiliary components, comprising approximately \$1.316M, or 9%, of budgeted auxiliary expenses. These remain largely unchanged from the FY22 Budget, and includes the \$150K subsidy from E&G for Child Development Center.

Incidental Fee (IFC) Component:

Incidental Fee has a net deficit budget of \$309K, with plans to cover the deficit from reserves.

- Enrollment fees are budgeted at \$3.987M, which assumes \$175K of summer revenue (1,400 students paying fee of \$125) and \$4.107M of academic year revenue (approximately 3,200 students paying fee of \$372 and 800 students paying fee of \$200 fall term, with attrition between winter and spring). The incidental fee will be charged to all Monmouth-campus students at the first credit at a rate of \$372; students who take courses off-campus (Salem, online) will pay a reduced fee of \$200.
- Incidental Fee expenses reflect the total allocation of \$4.296M as determined by the Incidental Fee Committee with funding for Abby's House/Food Pantry, Access, ASWOU, Athletics, Campus Recreation, Childcare, Creative Arts, Student Engagement, Student Activities Board, Student Media, and WOLF Ride.

Designated Operations & Service Departments Component:

Designated Operations & Service Department budgets are inclusive of primarily Council of Presidents and Telecommunications, as well as other small miscellaneous budgets. As such, the budgets have no significant changes from the FY22 Budget. See the FY23 Designated Operations, Service Departments, & Auxiliary Enterprises Budgets (excluding Athletics & IFC) worksheet for the index-level detail.

FY23 Preliminary Budget across Component Funds:

As shown on the Component Funds Budget Summary worksheet included below, combined component budgets results in a total net budget deficit across these funds of \$7.309M, or 8% of revenues.

COMMITTEE RECOMMENDATION:

It is recommended that the Western Oregon University Board of Trustees approve the FY23 Preliminary Budget as presented in the docket.

**Western Oregon University
FY23 Proposed Preliminary Budget
Component Funds Budget Summary**

	Education & General (E&G)	Auxiliary (excluding IFC)	Incidental Fee (IFC)	Designated Operations & Service Depts	Total
Revenues					
Enrollment Fees	31,989,301	1,621,319	3,987,165	113,134	37,710,919
Government Resources & Allocations	31,965,913	1,300,000	-	-	33,265,913
Gift Grants and Contracts	1,180,000	29,626	80,961	-	1,290,587
Investment	2,000,000	9,000	21	4,190	2,013,211
Sales & Services	500,000	10,778,567	185,443	126,630	11,590,640
Other Revenues	100,000	401,554	177,103	2,030,156	2,708,813
Total Revenues	67,735,214	14,140,066	4,430,693	2,274,110	88,580,083
Expenses					
Personnel	59,728,218	8,327,642	2,092,710	1,034,337	71,182,907
Services & Supplies	9,715,576	8,045,747	2,454,172	1,261,083	21,476,578
Capital Outlay	189,691	-	-	-	189,691
Total Expenses	69,633,484	16,373,389	4,546,883	2,295,420	92,849,176
Net Transfers	3,497,728	(1,543,023)	192,797	750	2,148,252
Total Expenses & Transfers	73,131,212	14,830,366	4,739,680	2,296,170	94,997,428
Net Recurring Budget	(5,395,998)	(690,300)	(308,987)	(22,060)	(6,417,345)
One Time Activities	891,366	-	-	-	891,366
Net Budget	(6,287,364)	(690,300)	(308,987)	(22,060)	(7,308,711)

Western Oregon University
 FY23 Proposed Preliminary Budget
 Education & General Fund Detail

	FY23 Proposed Preliminary Budget	FY22 Budget	Increase/ (Decrease) - FY22 Budget	FY22 Projection	Increase/ (Decrease) - FY22 Projection
Revenues					
Tuition & Fees					
Undergraduate Tuition					
Resident	19,436,860	19,420,776	16,084	19,455,263	(18,403)
WUE	6,128,169	7,004,598	(876,429)	6,272,354	(144,185)
Non-Resident	1,248,060	1,353,460	(105,400)	1,060,454	187,606
Total Undergraduate Tuition	<u>26,813,089</u>	<u>27,778,834</u>	<u>(965,745)</u>	<u>26,788,071</u>	<u>25,018</u>
Graduate Tuition	4,026,380	3,700,240	326,140	3,862,759	163,621
Summer					
Undergraduate	1,575,200	1,900,000	(324,800)	1,489,154	86,046
Graduate	736,000	800,000	(64,000)	737,939	(1,939)
Total Summer	<u>2,311,200</u>	<u>2,700,000</u>	<u>(388,800)</u>	<u>2,227,093</u>	<u>84,107</u>
Other Tuition	<u>360,000</u>	<u>360,000</u>	<u>-</u>	<u>344,728</u>	<u>15,272</u>
Total Tuition	<u>33,510,669</u>	<u>34,539,074</u>	<u>(1,028,405)</u>	<u>33,222,651</u>	<u>288,018</u>
Fees					
Matriculation	500,000	550,000	(50,000)	509,545	(9,545)
Course	300,000	300,000	-	324,214	(24,214)
Online Course	3,028,632	2,233,376	795,256	3,642,055	(613,423)
Other	150,000	150,000	-	228,342	(78,342)
Total Fees	<u>3,978,632</u>	<u>3,233,376</u>	<u>745,256</u>	<u>4,704,156</u>	<u>(725,524)</u>
Fee Remissions	<u>(5,500,000)</u>	<u>(5,500,000)</u>	<u>-</u>	<u>(5,000,000)</u>	<u>(500,000)</u>
Total Tuition & Fees (net of remissions)	<u>31,989,301</u>	<u>32,272,450</u>	<u>(283,149)</u>	<u>32,926,807</u>	<u>(937,506)</u>
Government Resources & Allocations					
Student Success & Completion (SSCM)	31,179,017	30,293,705	885,312	30,466,780	712,237
Benefits Navigator	115,000	-	-	115,000	-
Engineering Technology (ETSF)	292,648	307,728	(15,080)	292,648	-
Small-Energy Loan Program (SELP)	379,248	382,188	(2,940)	382,188	(2,940)
Total Government Resources & Allocations	<u>31,965,913</u>	<u>30,983,621</u>	<u>982,292</u>	<u>31,256,616</u>	<u>709,297</u>
Other Revenues					
Gift Grants and Contracts	1,180,000	622,260	557,740	1,146,263	33,737
Interest Earnings/Investment	2,000,000	2,000,000	-	1,758,862	241,138
Sales & Services	500,000	500,000	-	372,316	127,684
Other Revenues	100,000	100,000	-	773,835	(673,835)
Total Other Revenues	<u>3,780,000</u>	<u>3,222,260</u>	<u>557,740</u>	<u>4,051,276</u>	<u>(271,276)</u>
Total Revenues	67,735,214	66,478,331	1,256,883	68,234,699	(499,485)

Western Oregon University
 FY23 Proposed Preliminary Budget
 Education & General Fund Detail

	FY23 Proposed Preliminary Budget	FY22 Budget	Increase/ (Decrease) - FY22 Budget	FY22 Projection	Increase/ (Decrease) - FY22 Projection
Expenses					
Personnel					
Faculty Salaries	18,422,700	17,876,075	546,625	17,514,280	908,420
Unclassified Salaries	10,126,174	9,078,781	1,047,393	9,302,110	824,064
Faculty & Unclassified Supplemental Pay	570,647	572,206	(1,559)	669,934	(99,287)
Classified Salaries	6,646,464	6,545,170	101,294	6,119,228	527,236
Classified Pay	260,061	260,311	(250)	522,698	(262,637)
Student	1,897,830	1,785,055	112,775	1,468,785	429,045
OPE	21,804,341	21,128,003	676,338	20,868,384	935,957
Total Personnel	59,728,218	57,245,601	2,482,617	56,465,419	3,262,799
Services & Supplies					
Services & Supplies	13,067,155	13,295,408	(228,253)	13,169,002	(101,847)
Internal Sales	(3,351,579)	(3,273,841)	(77,738)	(3,147,435)	(204,144)
Total Services & Supplies	9,715,576	10,021,567	(305,991)	10,021,567	(305,991)
Capital Outlay					
	189,691	209,691	(20,000)	76,247	113,444
Total Expenses	69,633,484	67,476,859	2,156,625	66,563,233	3,070,251
Transfers					
Athletics Subsidy	3,176,817	2,979,025	197,792	2,979,025	197,792
Child Development Center Subsidy	150,000	150,000	-	150,000	-
SELP Funding Match	175,000	175,000	-	175,000	-
Misc. Other Transfers	(4,089)	13,342	(17,431)	(2,610)	(1,479)
Total Transfers	3,497,728	3,317,367	180,361	3,301,415	196,313
Total Recurring Expenses & Transfers	73,131,212	70,794,226	2,336,986	69,864,648	3,266,564
Net Recurring	(5,395,998)	(4,315,895)	(1,080,103)	(1,629,949)	(3,766,049)
Other Activities					
HEERF Reimbursement (net)	-	(3,000,000)	3,000,000	(4,020,464)	4,020,464
Quasi Endowment	-	-	-	850,000	(850,000)
Other Misc. Activities	891,366	924,811	(33,445)	600,000	291,366
Total Other Activities	891,366	(2,075,189)	2,966,555	(2,570,464)	3,461,830
Net	(6,287,364)	(2,240,706)	(4,046,658)	940,515	(7,227,879)
Beginning Fund Balance	11,810,809	10,870,294		10,870,294	
Projected Ending Fund Balance	5,523,445	8,629,588		11,810,809	
Fund Balance as a Percentage of Revenues	8.15%	12.98%		15.77%	

Western Oregon University
 FY23 Proposed Preliminary Budget
 Education & General Fund Scenarios

	FY22 Budget	FY23 Proposed Prelim Budget (-5% UG, 0% GR)	Alternative Enrollment Scenario (0% UG, 5% GR)	Variance Between Enrollment Scenarios
Revenues				
Tuition & Fees				
Tuition	34,539,074	33,510,669	35,121,669	1,611,000
Online fees	2,233,376	3,028,632	3,167,492	138,860
Other fees	1,000,000	950,000	950,000	-
Fee remissions	(5,500,000)	(5,500,000)	(5,500,000)	-
Total	32,272,450	31,989,301	33,739,161	1,749,860
Government Resources & Allocations	30,983,621	31,965,913	31,965,913	-
Other Revenues	3,222,260	3,780,000	3,780,000	-
Total Revenues	66,478,331	67,735,214	69,485,074	1,749,860
Expenses				
Personnel	57,245,601	59,728,218	59,728,218	-
Services & Supplies	10,021,567	9,695,576	9,695,576	-
Capital Outlay	209,691	209,691	209,691	-
Total Expenses	67,476,859	69,633,484	69,633,484	-
Net Transfers	3,317,367	3,497,728	3,497,728	-
Total Expenses & Transfers	70,794,226	73,131,212	73,131,212	-
Net Recurring Budget	(4,315,895)	(5,395,998)	(3,646,138)	1,749,860
One Time Activities	(2,075,189)	891,366	891,366	-
Net Budget	(2,240,706)	(6,287,364)	(4,537,504)	1,749,860
Beginning Fund Balance	10,870,294	11,810,809	11,810,809	-
Projected Ending Fund Balance	8,629,588	5,523,445	7,273,305	1,749,860
Fund Balance as a Percentage of Revenues	12.98%	8.15%	10.47%	2.31%

Western Oregon University
 FY23 Education & General Fund Budget
 By Index

INDEX	DEPT NAME	Total Revenue	Tenure-Track Faculty Salary (+) Acct 10102	NTT Faculty Salary (+) Acct 10102	Unclass Salary (+) 10103	Other Unclassified & Faculty Pay (+) 10200	Academic Pay Summer (+) Acct 10203	Classified Salary (+) Acct 10301	Classified Pay (+) Acct 10400	Student Pay (+) Acct 10501	Total OPE (+) Acct 109XX	Total Personnel Expense	Services and Supplies (+) Acct 20000	Capital Outlay/ Equip (+) Acct 40000	Intrnl Sales Reimburse (Redctn/Exp) (-) Acct 79000	Transfer In (-) Acct 91000	Transfer Out (+) Acct 92000	Total Expense	
PRESIDENT'S OFFICE/UNIVERSITY-WIDE																			
PRE907	President's Office	-	-	-	469,992	42,360	-	-	-	-	233,666	746,018	18,000	-	-	-	-	-	764,018
PRE909	Faculty Senate	-	-	-	-	-	-	-	-	1,743	62	1,805	2,570	-	-	-	-	-	4,375
PRE912	Commencement & Convocation	-	-	-	-	-	-	-	-	-	-	-	25,683	-	-	-	-	-	25,683
PRE920	Pastega Endowed Awards	-	-	-	-	-	-	-	-	-	-	-	2,850	-	-	-	(1,425)	-	1,425
PRE925	Faculty Athletic Representation	-	-	-	-	-	-	-	-	-	-	-	3,150	-	-	-	-	-	3,150
PRE927	WOU Board Support	-	-	-	-	-	-	-	-	-	-	-	122,500	-	-	-	-	-	122,500
PRE928	University Tree Advisory	-	-	-	-	-	-	-	-	-	-	-	3,240	-	-	-	-	-	3,240
PRE929	President's Campus Support	-	-	-	-	-	-	-	-	-	-	-	57,000	-	-	-	-	-	57,000
PRE930	Strategic Initiatives	-	-	-	-	-	-	-	-	-	-	-	360,000	-	-	-	-	-	360,000
PRE931	Visibility Initiatives	-	-	-	-	-	-	-	-	-	-	-	7,200	-	-	-	-	-	7,200
PRE932	Diversity Initiatives	-	-	-	-	-	-	-	-	-	-	-	9,000	-	-	-	-	-	9,000
PRE933	OCOP Dues	-	-	-	-	-	-	-	-	-	-	-	48,000	-	-	-	-	-	48,000
TOTAL PRESIDENT'S OFFICE/UNIVERSITY-WIDE		-	-	-	469,992	42,360	-	-	-	1,743	233,728	747,823	659,193	-	-	(1,425)	-	-	1,405,591
GENERAL COUNSEL																			
LEG901	WOU Legal Counsel	-	-	-	373,980	-	-	-	-	-	184,337	558,317	17,000	-	-	-	-	-	575,317
LEG902	Outside Legal Services	-	-	-	-	-	-	-	-	-	-	-	67,500	-	-	-	-	-	67,500
LEG903	Risk Management Assessments	-	-	-	-	-	-	-	-	-	-	-	630,000	-	-	-	-	-	630,000
TOTAL GENERAL COUNSEL		-	-	-	373,980	-	-	-	-	-	184,337	558,317	714,500	-	-	-	-	-	1,272,817
DIVERSITY EQUITY & INCLUSION																			
DEI901	Office of Diversity Equity & Inclus	-	-	-	164,000	-	-	-	-	-	92,474	256,474	55,000	-	-	-	-	-	311,474
TOTAL DIVERSITY EQUITY & INCLUSION		-	-	-	164,000	-	-	-	-	-	92,474	256,474	55,000	-	-	-	-	-	311,474
ACADEMIC AFFAIRS																			
PRO902	Provost	-	67,166	-	463,200	-	-	35,889	-	2,900	303,997	873,152	23,900	-	-	-	-	-	897,052
AAD901	Student Success & Advising	-	-	-	453,168	-	-	58,134	800	27,000	353,552	892,654	18,080	-	-	-	-	-	910,734
DOS949	Student Enrichment	-	-	-	230,761	-	-	11,110	-	2,693	168,133	412,698	19,620	-	-	-	-	-	432,318
ADM923	Office of Inter Stdn Acd Support	-	-	-	-	-	-	-	-	8,576	301	8,877	1,230	-	-	-	-	-	10,107
DEP701	Academic Effectiveness	-	-	-	-	-	-	-	-	-	-	-	41,450	-	-	-	-	-	41,450
ISS901	International Students and Scholars	-	-	-	93,081	-	-	-	-	10,958	67,577	171,616	15,000	-	-	-	-	-	186,616
LCT901	Learning Center	-	-	-	-	-	-	-	-	10,000	350	10,350	1,220	-	-	-	-	-	11,570
NWA901	Northwest Accreditation	-	-	-	-	-	-	-	-	-	-	-	31,524	-	-	-	-	-	31,524
PRO804	Honors Program - Acad Support	-	63,424	-	-	-	-	-	-	8,000	31,394	102,818	20,140	-	-	-	-	-	122,958
PRO808	Honors Program Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
PRO809	General Education	-	67,916	-	-	7,916	-	-	-	-	38,258	114,090	22,840	-	-	-	-	-	136,930
PRO810	Transfer Initiatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
PRO811	Interdisciplinary Studies	-	-	-	-	-	-	-	-	-	-	-	2,700	-	-	-	-	-	2,700
PRO812	Salem General	-	-	212,850	-	-	-	43,107	-	14,850	99,043	369,850	40,000	-	-	-	-	-	409,850
PRO813	Willamette Promise	-	-	-	-	90,000	-	-	-	-	32,085	122,085	84,200	-	-	-	-	-	206,285
PRO816	AA Reserve	-	-	-	-	-	-	-	-	-	-	-	140,747	-	-	-	-	-	140,747
PRO818	Endowed Jensen Lectureship	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4,804	4,804
PRO824	AA Course Release	-	-	325,215	-	-	-	-	-	-	115,941	441,156	-	-	-	-	-	-	441,156
PRO833	Institutional Research Office	-	-	-	129,276	6,441	-	-	-	-	82,392	218,109	10,000	-	-	-	-	-	228,109
PRO836	Partnerships	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
PRO837	New Faculty Start-Up	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
PRO921	Faculty Development	-	-	79,200	-	-	-	-	-	-	28,235	107,435	270,000	-	-	-	-	-	377,435
PRO923	Faculty Diversity Initiatives	-	-	-	-	-	-	-	-	-	-	-	18,000	-	-	-	-	-	18,000
PRO924	AA Technology	-	-	-	-	-	-	-	-	-	-	-	355,708	-	-	-	-	-	355,708
PRO927	Endowed Prof Business	-	-	-	-	-	-	-	-	-	-	-	5,304	-	-	-	-	-	2,652
PRO977	Undergraduate Research	-	-	-	-	-	-	-	-	-	-	-	7,200	-	-	(2,652)	-	-	7,200
REG901	Registrar	68,000	-	-	236,044	-	-	229,186	2,800	14,620	337,407	820,057	28,160	-	-	-	-	-	848,217
REG905	Diplomas/Certificates	2,000	-	-	-	-	-	-	600	-	214	814	8,000	-	-	-	-	-	8,814
SAB901	Study Abroad Program	-	-	-	-	-	-	-	-	-	-	-	7,500	-	-	-	-	-	7,500
WRC901	Writing Center	-	49,517	-	93,828	6,000	-	-	-	36,400	97,026	282,771	3,500	-	-	-	-	-	286,271
TOTAL ACADEMIC AFFAIRS		70,000	248,022	617,265	1,699,359	110,357	-	377,426	4,200	135,997	1,755,905	4,948,531	1,176,023	-	-	(2,652)	4,804	-	6,126,706

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INDEX	DEPT NAME	Total Revenue	Tenure-Track Faculty Salary (+) Acct 10102	NTT Faculty Salary (+) Acct 10102	Unclass Salary (+) 10103	Other Unclassified & Faculty Pay (+) 10200	Academic Pay Summ (+) Acct 10203	Classified Salary (+) Acct 10301	Classified Pay (+) Acct 10400	Student Pay (+) Acct 10501	Total OPE (+) Acct 109XX	Total Personnel Expense	Services and Supplies (+) Acct 20000	Capital Outlay/Equip (+) Acct 40000	Intrnl Sales Reimburse (Redctn/Exp) (-) Acct 79000	Transfer In (-) Acct 91000	Transfer Out (+) Acct 92000	Total Expense	
COLLEGE OF LIBERAL ARTS & SCIENCES																			
DLA904	Dean Liberal Arts/Sciences	-	-	-	205,632	-	-	42,420	-	581	139,466	388,099	4,450	-	-	-	-	392,549	
BUS902	Business	-	551,056	408,375	54,500	26,616	-	65,304	-	1,046	624,376	1,731,272	7,660	-	-	-	-	1,738,932	
CAD916	Creative Arts	-	1,451,793	508,365	93,894	4,500	-	29,745	-	32,559	1,238,736	3,359,592	41,075	-	-	-	-	3,400,667	
CAD948	Art Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
CAD949	Music Practice Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
CAD950	Dance Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
CAD951	Theatre Art Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
CAD952	MIDI Electronic Music Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
COR901	Criminal Justice	-	499,923	290,565	-	4,500	-	42,888	-	-	530,839	1,368,715	9,125	-	-	-	-	1,377,840	
CSD902	Computer Science Instruction	-	649,815	111,870	-	4,500	-	47,610	-	12,403	460,595	1,286,793	25,525	-	-	-	-	1,312,318	
DLA905	Supplemental Instr Staff-LAS	-	-	5,445	-	73,600	550,348	-	-	-	222,882	852,275	-	-	-	-	-	852,275	
DLA906	Military Science Labs	-	-	-	-	-	-	-	-	-	-	-	-	460	-	-	-	460	
DLA914	LAS Dean's Discretionary	-	-	-	-	-	-	-	-	-	-	-	-	45,732	-	-	-	45,732	
DLA915	Chair Research/Travel	-	-	-	-	-	-	-	-	-	-	-	-	10,400	-	-	-	10,400	
DLA941	Organizational Leadership	-	-	59,400	-	9,000	-	21,634	-	-	55,905	145,939	13,440	-	-	-	-	159,379	
DLA943	Individualized Course (ICF) Payout	-	-	-	-	100,000	-	-	-	-	35,650	135,650	-	-	-	-	-	135,650	
HUM902	Humanities	-	1,431,903	474,705	-	4,500	-	53,676	-	2,128	1,176,634	3,143,546	13,600	-	-	-	-	3,157,146	
HUM909	Modern Language Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
NSM902	Math Dept/Nat Science Div	-	1,341,936	425,700	-	4,500	-	289,837	-	13,036	1,228,669	3,303,678	48,670	-	-	-	-	3,352,348	
NSM964	Natural Sciences Tutoring Center	-	-	-	-	-	-	-	-	25,000	875	25,875	-	-	-	-	-	25,875	
NSM965	Biology Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
NSM966	Chemistry Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
NSM967	ES-GS-PH Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
NSM968	GIS Equipment Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
MTH042	Mathematics	-	607,737	183,150	-	-	-	-	-	13,498	469,469	1,273,854	8,100	-	-	-	-	1,281,954	
MTH043	Math Center	-	-	-	-	-	-	-	-	25,537	894	26,431	270	-	-	-	-	26,701	
MTH044	Math Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
PSY901	Psychology Division	-	876,083	266,310	-	4,500	-	54,084	-	-	717,218	1,918,195	24,750	-	-	-	-	1,942,945	
SOC902	Social Science	-	1,132,752	133,155	-	4,500	-	53,064	-	1,511	766,722	2,091,704	7,985	-	-	-	-	2,099,689	
TOTAL LIBERAL ARTS & SCIENCES		-	8,542,998	2,867,040	354,026	240,716	550,348	700,261	-	127,299	7,668,930	21,051,618	261,242	-	-	-	-	21,312,860	
COLLEGE OF EDUCATION																			
DOE905	Dean of Education Admin	-	-	-	331,448	-	-	57,244	1,161	6,666	242,433	638,951	27,850	-	-	-	-	666,801	
CPL901	Clinical Practice and Licensure	-	-	-	63,264	-	-	53,676	-	-	75,699	192,639	36,600	-	-	-	-	229,239	
CPL903	Clinical Prac & Lice Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
DOE901	Education and Leadership	-	1,595,559	701,910	42,012	4,500	-	53,064	-	3,000	1,466,797	3,866,842	43,580	-	-	-	-	3,910,422	
DOE926	DOE Suppl Instructional Staff	-	-	210,375	-	27,600	410,267	-	-	-	231,099	879,341	-	-	-	-	-	879,341	
DOE953	Chair Research/Travel	-	-	-	-	-	-	-	-	-	-	-	3,900	-	-	-	-	3,900	
DOE964	COE Accreditation	-	-	-	-	-	-	-	-	-	-	-	25,570	-	-	-	-	25,570	
DOE965	Bilingual Initiative	-	-	-	-	-	-	-	-	-	-	-	23,370	-	-	-	-	23,370	
DOE984	Gentle Endowed Prof. Education	-	-	-	-	-	-	-	-	-	-	-	8,670	-	-	(4,816)	-	3,854	
DOE985	Education&Leadership Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
DOE986	COE Credit Overlay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
DOE995	COE Indirect Cost Rc	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
DPS901	Deaf Studies & Professional Studies	-	480,120	534,600	-	4,500	-	53,268	3,455	1,500	672,696	1,750,139	16,445	-	-	-	-	1,766,584	
DPS903	Deaf Studies Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
HEX901	Health & Exercise Science Div	-	770,263	322,245	-	4,500	-	44,892	-	1,500	696,211	1,839,611	28,920	-	-	-	-	1,868,531	
HEX904	Health & Exercise Sci Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
TOTAL EDUCATION		-	2,845,942	1,769,130	436,724	41,100	410,267	262,144	4,616	12,666	3,384,935	9,167,523	214,905	-	-	(4,816)	-	9,377,612	

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LIBRARY																		
LIB901	Library Operations	-	441,737	129,951	179,154	5,800	-	227,184	2,000	213,620	600,043	1,799,489	170,285	-	-	-	-	1,969,774
LIB904	Lost Books	17,000	-	-	-	-	-	-	-	-	-	-	3,000	-	-	-	-	3,000
LIB927	Library Exhibits	-	-	-	-	-	-	-	-	-	-	-	2,250	-	-	-	-	2,250
LIB945	Library Books - General	-	-	-	-	-	-	-	-	-	-	-	-	21,631	-	-	-	21,631
LIB947	Library Books - Continuation	-	-	-	-	-	-	-	-	-	-	-	-	23,900	-	-	-	23,900
LIB948	Library Books - Serials	-	-	-	-	-	-	-	-	-	-	-	-	11,000	-	-	-	11,000
LIB949	Library Books - Binding	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
LIB950	Library Subscriptions/ Databases	-	-	-	-	-	-	-	-	-	-	-	159,300	-	-	-	-	159,300
LIB951	Library Books - OCLC	-	-	-	-	-	-	-	-	-	-	-	11,000	-	-	-	-	11,000
LIB952	Library Subscriptions/ Other	-	-	-	-	-	-	-	-	-	-	-	8,000	-	-	-	-	8,000
LIB953	Library Subscriptions/ eBooks	-	-	-	-	-	-	-	-	-	-	-	18,000	-	-	-	-	18,000
LIB956	Library Subs/ Pay Per View	-	-	-	-	-	-	-	-	-	-	-	40,000	-	-	-	-	40,000
LIB959	Library Subscriptions/ eJournal	-	-	-	-	-	-	-	-	-	-	-	169,709	-	-	-	-	169,709
LIB968	Curriculum Materials Course Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
LIB969	Library Books_DPT Health Science	-	-	-	-	-	-	-	-	-	-	-	7,500	5,000	-	-	-	12,500
LIB970	Open Edu Resources_Textbook Afford	-	-	-	-	-	-	-	-	-	-	-	5,000	10,000	-	-	-	15,000
LIB971	Academic Innovation	-	-	-	193,224	12,800	-	56,796	250	4,637	161,965	429,672	32,400	-	-	-	-	462,072
TOTAL LIBRARY		17,000	441,737	129,951	372,378	18,600	-	283,980	2,250	218,257	762,008	2,229,161	626,444	71,531	-	-	-	2,927,136
GRADUATE STUDIES/SPONSORED RESEARCH																		
GRA901	Graduate Program	30,000	-	-	194,445	-	-	53,472	-	4,648	136,499	389,064	26,430	-	-	-	-	415,494
GRA903	Graduate Studies - Sales	-	-	-	-	-	-	-	-	-	-	-	18,000	-	-	-	-	18,000
GRA904	Graduate Office Matric Fees	80,000	-	-	12,087	-	-	-	-	26,000	8,282	46,369	8,460	-	-	-	-	54,829
GRA905	Graduate Assistant Remissions	-	-	-	-	-	-	-	-	296,352	435,413	731,765	-	-	-	-	-	731,765
RCD905	RCD Operations	-	-	-	37,277	-	-	14,767	3,950	-	34,590	90,584	1,800	-	-	-	-	92,384
SPO902	Sponsored Research	425,000	-	-	264,603	-	-	47,610	-	-	196,326	508,539	30,746	-	-	(218,530)	-	320,755
SPO903	Sponsored Research Support Services	-	-	-	16,746	4,000	-	-	-	-	10,628	31,374	4,404	-	-	-	-	35,778
SPO904	Institutional Review Board	-	-	-	-	-	-	-	-	4,648	163	4,811	16,930	-	-	-	-	21,741
TOTAL GRADUATE STUDIES/SPONSORED RESEARCH		535,000	-	-	525,158	4,000	-	115,849	3,950	331,648	821,901	1,802,506	106,770	-	-	(218,530)	-	1,690,746
FINANCE & ADMINISTRATION																		
VPF901	Office of VP for Business & Finance	-	-	-	428,881	-	-	-	-	5,000	238,092	671,973	7,740	-	-	-	-	679,713
VPF9XX	Campus Maintenance Projects	-	-	-	-	-	-	-	-	-	-	-	300,000	-	-	-	-	300,000
BAO901	Business Office	40,000	-	-	292,375	-	-	471,852	4,500	30,000	472,350	1,271,077	275,000	-	-	-	-	1,546,077
BAO911	NDSL Recoveries	25,000	-	-	-	-	-	15,795	-	-	12,434	28,229	-	-	-	-	-	28,229
BAO914	Records Retention	-	-	-	-	-	-	-	-	-	-	-	2,000	-	-	-	-	2,000
BAO923	Bank Processing Charges	100,000	-	-	-	-	-	-	-	-	-	-	100,000	-	-	-	-	100,000
CPC901	Capital Planning & Construction	-	-	-	276,481	-	-	-	-	3,000	149,684	429,165	-	-	-	-	-	429,165
HRO915	Human Resources Operation	-	-	-	558,526	-	-	34,344	-	-	381,400	974,270	178,104	-	-	-	-	1,152,374
HRO918	Support ADA/WC Equip	-	-	-	171,395	-	-	-	-	-	104,855	276,250	13,500	-	-	-	-	289,750
HRO917	Staff Professional Dev	-	-	-	-	-	-	-	-	-	-	-	20,700	-	-	-	-	20,700
PPO908	Bldg Maint and Alteration	50,000	-	-	198,304	260	-	867,887	37,000	139,440	704,335	1,947,226	94,000	-	(440,000)	-	-	1,601,226
PPO912	Janitorial	-	-	-	110,172	800	-	668,522	35,000	19,050	631,117	1,464,661	140,000	-	(698,619)	-	-	906,042
PPO920	Campus Grounds Maintenance	3,000	-	-	-	-	-	403,097	8,000	34,860	283,810	729,767	161,010	-	(150,000)	-	-	740,777
PPO931	Print Production	120,000	-	-	-	-	-	34,134	-	10,000	29,523	73,657	5,000	-	-	-	-	78,657
PPO932	Mail Room	-	-	-	-	-	-	57,688	-	32,564	38,711	128,963	60,000	-	(60,000)	-	-	128,963
PPU901	Light and Power	-	-	-	-	-	-	-	-	-	-	-	700,000	-	(240,000)	-	-	460,000
PPU902	Water	-	-	-	-	-	-	-	-	-	-	-	267,000	-	(5,000)	-	-	262,000
PPU903	Gasoline	-	-	-	-	-	-	-	-	-	-	-	24,000	-	(7,000)	-	-	17,000
PPU904	Heating - Oil	-	-	-	-	-	-	-	-	-	-	-	10,000	-	-	-	-	10,000
PPU905	Heating - Gas	-	-	-	-	-	-	-	-	-	-	-	309,760	-	(140,000)	-	-	169,760
PPU906	WOU:Salem Utilities	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
PSS915	Risk Management	-	-	-	61,644	-	-	-	-	-	38,981	100,625	19,230	-	-	-	-	119,855
PSS917	Public Safety	-	-	-	70,704	-	-	372,333	71,345	92,698	330,096	937,176	26,505	-	(240,960)	-	-	722,721
PSS926	Emergency Preparedness Team	-	-	-	-	-	-	-	-	-	-	-	6,300	-	-	-	-	6,300
UCS901	Computing Services	25,000	-	-	428,352	-	-	1,278,464	20,500	100,647	934,024	2,761,987	144,492	50,000	(160,000)	-	-	2,796,479
UCS905	IT Resale	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
UCS911	Technology Support - Students	10,000	-	-	-	-	-	-	-	82,832	2,900	85,732	497,606	68,160	-	-	-	651,498
UCS914	Campus Software	-	-	-	-	-	-	-	-	-	-	-	187,996	-	(10,000)	-	-	177,996
UCS915	Elucian Services - Banner Support	-	-	-	-	-	-	-	-	-	-	-	681,775	-	-	-	-	681,775
UCS916	GFA Machines	-	-	-	-	-	-	-	-	-	-	-	150,000	-	-	-	-	150,000
TOTAL FINANCE/ADMIN		373,000	-	-	2,596,834	1,060	-	4,204,116	176,345	550,091	4,352,312	11,880,758	4,381,717	118,160	(2,151,579)	-	-	14,229,056
STUDENT AFFAIRS																		

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DOS901	VP of Student Affairs	-	-	-	231,593	-	-	43,370	-	27,895	154,471	457,329	61,273	-	-	-	-	518,602
ADM924	Office of Admissions	-	-	-	595,628	312	-	272,506	1,700	59,084	601,345	1,530,575	575,761	-	-	-	-	2,106,336
DOS809	Community Internship Program	-	-	-	-	-	-	-	-	30,000	1,050	31,050	-	-	-	-	-	31,050
DOS819	Benefits Navigator	115,000	-	-	47,568	-	-	-	-	-	33,963	81,531	35,194	-	-	-	-	116,725
DOS906	Career Development Center	-	-	-	129,420	-	-	60,073	-	12,963	114,942	317,398	32,950	-	-	-	-	350,348
DOS911	Office of Disability Services	-	-	-	491,219	110,000	-	51,048	-	45,564	404,171	1,102,002	67,380	-	-	-	-	1,169,382
DOS948	Upward Bound Program	-	-	-	29,090	-	-	-	-	-	18,669	47,759	8,325	-	-	-	-	56,084
DOS997	Veteran's Success Center	-	-	-	50,000	-	-	-	-	-	34,829	84,829	4,500	-	-	-	-	89,329
DOS999	Abby's House - GF	-	-	-	56,856	-	-	-	-	10,125	37,629	104,610	25,200	-	-	-	-	129,810
FAI908	Financial Aid Operation	-	-	-	448,498	-	-	162,915	6,000	17,550	424,772	1,059,735	108,720	-	-	-	-	1,168,455
MSS901	Multicultural Student Services	-	-	-	153,217	2,142	-	-	-	20,074	107,101	282,534	23,155	-	-	-	-	305,689
SEO908	New Student and Family Programs	-	-	-	5,533	-	-	-	-	62,274	5,854	73,661	37,368	-	-	-	-	111,029
SEO909	ID Photography	5,000	-	-	-	-	-	-	-	1,824	64	1,888	3,000	-	-	-	-	4,888
TOTAL STUDENT AFFAIRS		120,000	-	-	2,238,622	112,454	-	589,912	7,700	287,353	1,938,860	5,174,902	982,826	-	-	-	-	6,157,728
DEVELOPMENT IN ADVANCEMENT		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
COM902	Strategic Comm & Marketing	-	-	-	229,664	-	-	50,460	5,000	26,840	160,793	472,757	49,220	-	-	-	-	521,977
DIA604	Magazine	-	-	-	-	-	-	-	-	-	-	-	22,000	-	-	-	-	22,000
DIA907	Office of Inst. Advancement	160,000	-	-	665,437	-	-	-	3,000	42,561	384,324	1,095,322	42,640	-	-	-	-	1,137,962
DIA922	Alumni Office	-	-	-	-	-	-	62,316	3,000	4,709	40,455	110,480	18,000	-	-	-	-	128,480
DIA954	Annual Fund	-	-	-	-	-	-	-	-	8,667	304	8,971	27,000	-	-	-	-	35,971
MKT902	Marketing	-	-	-	-	-	-	-	-	-	-	188,590	-	-	-	-	-	188,590
TOTAL DEVELOPMENT IN ADVANCEMENT		160,000	-	-	895,101	-	-	112,776	11,000	82,777	585,876	1,687,530	347,450	-	-	-	-	2,034,980
GENERAL INSTITUTION		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GEN710	Institution Wide - Instruct Support	-	-	-	-	-	-	-	-	-	-	900,000	-	-	-	-	-	900,000
GEN803	Operating Reserve	-	-	-	-	-	-	-	50,000	150,000	23,075	223,075	300,000	-	-	-	-	523,075
GEN812	College Center Gen Fund Use	-	-	-	-	-	-	-	-	-	-	160,000	-	-	-	-	-	160,000
GEN819	General Institutional Expense	1,900,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GEN837	Admin. Cost Recoveries (Auxiliary)	-	-	-	-	-	-	-	-	-	-	-	-	-	(1,200,000)	-	-	(1,200,000)
GEN862	Summer Session - Even	1,964,520	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GEN863	Summer Session - Odd	346,680	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GEN877	Institution-Wide SELP Loans	379,248	-	-	-	-	-	-	-	-	-	234,000	-	-	-	175,000	-	409,000
GEN896	Copier Replacement Reserve	-	-	-	-	-	-	-	-	-	-	30,000	-	-	-	-	-	30,000
GEN941	State Government Assessments	-	-	-	-	-	-	-	-	-	-	49,679	-	-	-	-	-	49,679
GEN944	Instruction Fees	34,978,101	-	-	-	-	-	-	-	-	-	1,300,000	-	-	-	-	-	1,300,000
GEN945	Fee Remissions	(5,175,000)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GEN954	Indirect Cost Recoveries	270,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GEN971	Staff/Dependents at other Inst	-	-	-	-	-	-	-	-	-	-	20,000	-	-	-	-	-	20,000
GEN983	Institutional Wide	-	-	-	-	-	-	-	-	-	-	222,405	-	-	-	-	-	222,405
GEN984	Prior Yr Balance To/From BD	31,471,665	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3,545,347	3,545,347
IDC901	Colleges/Std Aff. Indirect Cost Rc	325,000	-	-	-	-	-	-	-	-	-	325,000	-	-	-	-	-	325,000
TOTAL GENERAL INSTITUTION		66,460,214	-	-	-	-	-	-	50,000	150,000	23,075	223,075	3,541,084	-	(1,200,000)	-	3,720,347	6,284,506
RECURRING BUDGETED GENERAL FUND		67,735,214	12,078,699	5,383,386	10,126,174	570,647	960,615	6,646,464	260,061	1,897,830	21,804,341	59,728,218	13,067,155	189,691	(3,351,579)	(227,423)	3,725,151	73,131,212
TOTAL ONE-TIME FUNDS		-	-	-	-	-	-	-	-	9,819	344	10,163	881,203	-	-	-	-	891,366
EDUCATION & GENERAL FUND TOTAL		67,735,214	12,078,699	5,383,386	10,126,174	570,647	960,615	6,646,464	260,061	1,907,649	21,804,685	59,738,381	13,948,358	189,691	(3,351,579)	(227,423)	3,725,151	74,022,578

Western Oregon University
 FY23 Designated Operations, Service Departments,
 & Auxiliary Enterprises Budgets (excluding Athletics & IFC)

INDEX	DEPT NAME	Total Revenue	Unclass Salary (+) Acct 10103	Other Unclassified Pay (+) Acct 10200	Classified Salary (+) Acct 10301	Classified Pay (+) Acct 10400	Student Pay (+) Acct 10501	Total OPE (+) Acct 109XX	Total Personnel	Services and Supplies (+) Acct 20000	General Admin Overhead (+) Acct 28204	Bond Debt (+) Acct 28811	Student Aid (+) Acct 50000	Merchandise for Resale (+) Acct 60000	Indirect Costs (+) Acct 70003	Depreciation (+) Acct 80500	Transfer In (-) Acct 91000	Transfer Out (+) Acct 92000	Total Expense	NET (ignoring depr.)
DESIGNATED OPS AND SERVICE DEPTS FUNDS																				
COP901	Council of Presidents	460,000	300,876	-	-	-	-	158,275	459,151	45,805	-	-	-	-	-	-	-	-	504,956	(44,956)
CTL903	CTL -Tapes and Sales Services	40	-	-	-	-	-	-	-	40	-	-	-	-	-	-	-	-	40	-
DOS957	National Student Exchange Program	3,500	-	-	-	-	-	-	-	3,500	-	-	-	-	-	-	-	-	3,500	-
DOS811	Career Development Revenue	9,999	-	-	-	-	-	-	-	9,090	-	-	-	-	909	-	-	-	9,999	-
PSS918	Crime Prevention	3,000	-	-	-	-	-	-	-	2,727	-	-	-	-	273	-	-	-	3,000	-
PP0928	Compactor Services	34,690	-	-	-	-	-	-	-	34,690	-	-	-	-	-	-	-	-	34,690	-
PRE919	Sundry Gifts	1,000	-	-	-	-	-	-	-	909	-	-	-	-	91	-	-	-	1,000	-
RCD901	RCDHHA Summer Program	65,000	-	23,702	-	-	-	8,451	32,153	14,083	-	-	-	-	4,624	-	-	-	50,860	14,140
RCD902	ASL Testing	15	-	-	-	-	-	-	-	15	-	-	-	-	-	-	-	-	15	-
RCD904	Resource Center on Deafness	5,000	-	3,000	-	-	-	1,070	4,070	535	-	-	-	-	461	-	-	-	5,066	(66)
REG910	Veteran's Service	3,000	-	-	-	-	-	-	-	3,000	-	-	-	-	-	-	-	-	3,000	-
SAB902	Non-Credit International Program	80	-	-	-	-	-	-	-	72	-	-	-	-	8	-	-	-	80	-
CAD910	WOU Band Festival	10,105	-	3,000	-	-	-	500	4,588	3,976	-	-	-	-	857	-	-	750	10,171	(66)
CAD912	Music Scholarships	200	-	-	-	-	-	-	-	-	-	-	200	-	-	-	-	-	200	-
CAD928	Quarried Sculpture Stone	30	-	-	-	-	-	-	-	30	-	-	-	-	-	-	-	-	30	-
CAD929	WOU Choral Festival	510	-	-	-	-	-	300	311	152	-	-	-	-	47	-	-	510	-	
DEP910	CAI Non-Credit Special Projects	300	-	-	-	-	-	-	-	300	-	-	-	-	-	-	-	-	300	-
TRD909	TR Consulting Services	3,500	-	-	-	-	-	-	-	3,181	-	-	-	-	319	-	-	-	3,500	-
TRD911	TR Publications	800	-	-	-	-	-	-	-	727	-	-	-	-	73	-	-	-	800	-
TRD914	TR Tech Support Center	30,000	-	-	-	-	-	-	-	30,000	-	-	-	-	-	-	-	-	30,000	-
TRD886	Traffic Safety Education	34,635	-	-	-	-	-	-	-	31,486	-	-	-	-	3,149	-	-	-	34,635	-
GFA935	General Scholarship Fund	50,000	-	-	-	-	-	-	-	-	-	-	50,000	-	-	-	-	-	50,000	-
UCS904	Computer Maintenance	74,568	-	-	31,988	3,400	1,400	21,033	57,821	15,754	-	-	-	-	-	3,000	-	-	76,575	993
UCS907	Telecommunications	1,484,138	-	-	299,476	14,000	-	162,767	476,243	1,000,000	-	-	-	-	-	270,000	-	-	1,746,243	7,895
TOTAL DESIGNATED OPS AND SERVICE DEPTS FUNDS		2,274,110	300,876	29,702	331,464	17,400	2,200	352,695	1,034,337	1,200,072	-	-	50,200	-	10,811	273,000	-	750	2,569,170	(22,060)
AUXILIARY ENTERPRISES FUNDS (EXCLUDING ATHLETICS & IFC)																				
DIA517	DIA Smith Series Revenue Odd Year	25,000	-	-	-	-	-	-	-	23,148	1,852	-	-	-	-	-	-	-	25,000	-
DIA527	DIA Smith Series Revenue Even Year	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
PSS922	Parking	352,000	60,600	-	57,312	5,000	20,000	77,465	220,377	150,000	29,631	-	-	-	-	-	-	-	400,008	(48,008)
GEN876	Recreation Center Building Fee	355,774	-	-	-	-	-	-	-	-	-	-	-	-	-	-	460,000	-	460,000	(104,226)
GFA962	Vending Inc(copier)-Library	500	-	-	-	-	-	-	-	462	37	-	-	-	-	-	-	-	499	1
GFA964	Vending Income-General	5,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5,000	5,000	-
AUX990	Conference Services	10,000	54,780	-	-	-	-	36,534	91,314	5,000	7,706	-	-	-	-	-	(94,020)	-	10,000	-
AUX991	Bookstore	850,000	63,120	-	164,602	15,000	10,000	171,903	424,625	100,000	73,970	-	-	400,000	-	-	-	-	998,595	(148,595)
OUR901	University Residences Operations	6,005,389	437,567	2,345	232,270	15,910	122,850	483,209	1,294,151	1,888,546	254,616	1,252,242	-	-	-	-	(180,000)	1,494,814	6,004,369	1,020
OUR902	Residence Hall Prog & Training	-	-	-	-	-	-	-	-	38,888	3,112	-	-	-	-	-	(42,000)	-	-	-
OUR903	Residence Hall Association	-	-	-	-	-	-	-	-	37,037	2,963	-	-	-	-	-	(40,000)	-	-	-
OUR919	Vending Income -Dorms	7,000	-	-	-	-	-	-	-	6,481	519	-	-	-	-	-	-	-	7,000	(0)
AUX977	Residential Dining	3,335,200	199,908	500	643,414	6,750	383,130	648,221	1,881,923	446,612	243,432	-	-	714,353	-	-	-	180,000	3,466,320	(131,120)
AUX978	Retail Dining	12,600	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	12,600
AUX994	Allegro	150,000	-	-	-	-	28,728	1,005	29,733	24,589	8,683	-	-	54,203	-	-	-	-	117,208	32,792
SHC904	Health Service	1,277,842	287,035	9,754	350,050	49,341	-	441,786	1,137,966	257,846	111,665	158,000	-	-	-	107,844	(90,000)	-	1,683,321	(297,635)
SHC916	Health Counseling Building Fee	87,703	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	90,000	90,000	(2,297)
DOE993	Q-Loop Studios	1,000	-	-	-	-	-	-	-	925	74	-	-	-	-	-	-	-	999	1
CAD953	Rainbow Dance Theatre	36,626	-	25,000	-	-	-	8,913	33,913	500	2,754	-	-	-	-	-	-	-	37,167	(541)
PRO817	Child Development Center	194,804	107,339	2,000	21,639	-	40,080	84,658	255,716	38,409	23,530	-	-	-	-	-	(150,000)	-	167,655	27,149
TOTAL AUXILIARY ENTERPRISES FUNDS (EXCLUDING ATHLETICS)		12,706,438	1,210,349	39,599	1,469,287	92,001	604,788	1,953,694	5,369,718	3,018,443	764,544	1,410,242	-	1,168,556	-	107,844	(596,020)	2,229,814	13,473,141	(658,859)
TOTAL DESIGNATED OPS, SERVICE DEPTS, AND AUXILIARY ENTERPRISES		14,980,548	1,511,225	69,301	1,800,751	109,401	606,988	2,306,389	6,404,055	4,218,515	764,544	1,410,242	50,200	1,168,556	10,811	380,844	(596,020)	2,230,564	16,042,311	(680,919)

Western Oregon University
FY23 Athletics (Non-IFC) Budgets

		Unclass Salary	Other Unclassified Pay	Classified Salary	Classified Pay	Student Pay	Total OPE	Total Personnel	Services and Supplies	General Admin Overhead	Travel	Student Aid	Transfer In	Transfer Out	Total Expense	NET
		(+)	(+)	(+)	(+)	(+)	(+)		(+)	(+)	(+)	(+)	(-)	(+)		
INDEX	DEPT NAME	Acct 10103	Acct 102XX	Acct 10301	Acct 10400	Acct 10501	Acct 109XX		Acct 20000	Acct 28204	Acct 39000	Acct 50000	Acct 91000	Acct 92000		
Athletics General Fund Support																
JF1101	General Fund - Administration	275,403		87,408			231,366	594,177		43,970			(638,147)		0	(0)
JF1501	Gen Fund - Athletic Training	166,544					127,389	293,933		21,752			(315,685)		(0)	0
JF1601	Gen Fund - Athletic Performance	117,732					71,128	188,860		13,976			(202,836)		-	-
JF2101	General Fund Ath Support- Football	292,884					164,651	457,535		33,858			(491,393)		-	-
JF2201	Gen Fun Ath Support-Volleyball	97,800					68,874	166,674		12,334			(179,008)		(0)	0
JF2301	Gen Fund Ath Support- Womens Soccer	99,396					69,443	168,839		12,495			(181,334)		-	-
JF2501	Gen Fund Ath Sup-Mens Basketball	123,660					78,093	201,753		14,930			(216,683)		-	-
JF2601	Gen Fund Ath Sup- W Basketball	117,612					75,937	193,549		14,323			(207,872)		(0)	0
JF2801	Gen Fund Supp- XC/Track	106,056					71,817	177,873		13,163			(191,036)		-	-
JF2901	Gen Fund Ath Sup - Baseball	110,156					70,382	180,538		13,360			(193,898)		-	-
JF3001	Gen Fund Ath Sup - Softball	97,800					68,874	166,674		12,334			(179,008)		(0)	0
JF3101	Gen Fund Ath Support- Mens Soccer	98,424					69,096	167,520		12,397			(179,917)		-	-
TOTAL GENERAL FUND SUPPORT		1,703,467	-	87,408	-	-	1,167,050	2,957,924	-	218,892	-	-	(3,176,817)	-	(1)	1
TICKETS/CONCESSIONS																
JT2101	Tickets/Concessions - Football	20,000														20,000
JT2201	Tickets/Concessions-Volleyball	1,000														1,000
JT2301	Tickets/Concessions- Womens Soccer	1,000														1,000
JT2501	Tickets/Concess-Mens Basketball	5,000														5,000
JT2601	Tickets/Concessions- W Basketball	1,000														1,000
JT2901	Tickets/Concessions - Baseball	1,000														1,000
JT3001	Tickets/Concessions- Softball	1,000														1,000
JT3101	Tickets/Concessions- M Soccer	1,000														1,000
TOTAL TICKETS/CONCESSIONS		31,000	-	-	-	-	-	-	-	-	-	-	-	-	-	31,000
LOTTERY																
JL1101	Lottery - Administration	1,300,000							148,976	11,024		1,140,000			1,300,000	-
NCAA																
JN1101	NCAA - Administration	4,000							3,724	276					4,000	0
JN2501	NCAA - Mens Basketball	5,370							5,000	370					5,370	-
JN4201	NCAA - M Cross Country	2,685							2,500	185					2,685	-
JN4301	NCAA - W Cross Country	2,685							2,500	185					2,685	-
JN4401	NCAA - M Indoor Track	2,685							2,500	185					2,685	-
JN4501	NCAA - W Indoor Track	2,685							2,500	185					2,685	-
JN4601	NCAA - M Outdoor Track	3,759							3,500	259					3,759	-
JN4701	NCAA - W Outdoor Track	3,759							3,500	259					3,759	-
TOTAL NCAA		27,628	-	-	-	-	-	-	25,724	1,904	-	-	-	-	27,628	0
RECRUITING																
JR2101	Recruiting - Football									906	12,240				13,146	(13,146)
JR2201	Recruiting - Volleyball									377	5,100				5,477	(5,477)
JR2301	Recruiting - Womens Soccer									377	5,100				5,477	(5,477)
JR2501	Recruiting - Mens Basketball									377	5,100				5,477	(5,477)
JR2601	Recruiting - W Basketball									377	5,100				5,477	(5,477)
JR2901	Recruiting - Baseball									377	5,100				5,477	(5,477)
JR3001	Recruiting - Softball									377	5,100				5,477	(5,477)
JR3101	Recruiting - M Soccer									377	5,100				5,477	(5,477)
JR4201	Recruiting - M Cross Country									126	1,700				1,826	(1,826)
JR4301	Recruiting- W Cross Country									126	1,700				1,826	(1,826)
JR4401	Recruiting - M Indoor Track									126	1,700				1,826	(1,826)
JR4501	Recruiting - W Indoor Track									126	1,700				1,826	(1,826)
JR4601	Recruiting - M Outdoor Track									126	1,700				1,826	(1,826)
JR4701	Recruiting - W Outdoor Track									126	1,700				1,826	(1,826)
TOTAL RECRUITING		-	-	-	-	-	-	-	-	4,302	58,140	-	-	-	62,442	(62,442)
SPECIAL PROJECTS																
JS2101	Special Projects - Football	75,000							69,832	5,168					75,000	0
TOTAL SPECIAL PROJECTS		75,000	-	-	-	-	-	-	69,832	5,168	-	-	-	-	75,000	0
TOTAL ATHLETICS (NON-IFC) FUNDS		1,433,628	1,703,467	-	87,408	-	1,167,050	2,957,924	244,532	241,290	58,140	1,140,000	(3,176,817)	-	1,465,069	(31,441)

Western Oregon University
FY23 Incidental Fee Budgets

INDEX	DEPT NAME	Total Revenue	Unclass Salary (+) Acct 10103	Other Unclassified Pay (+) Acct 10200	Classified Salary (+) Acct 10301	Classified Pay (+) Acct 10400	Student Pay (+) Acct 10501	Total OPE (+) Acct 109XX	Total Personnel	Services and Supplies (+) Acct 20000	General Admin Overhead (+) Acct 28204	Travel (+) Acct 39000	Depreciation (+) Acct 80500	Transfer In (-) Acct 91000	Transfer Out (+) Acct 92000	Total Expense	NET (Ignoring depr.)
ADMINISTRATIVE																	
GEN897	IFC Computer Reserve	-	-	-	-	-	-	-	-	-	-	-	-	(15,000)	15,000	-	-
GEN948	Extraordinary Travel	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GEN949	Child Care Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GEN950	SS Incidental Fees	175,000	-	-	-	-	-	-	-	-	-	-	-	(49,425)	49,425	-	175,000
GEN951	Acad Yr Incidental Fees	3,812,165	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(483,974)
TOTAL ADMINISTRATIVE		3,987,165	-	-	-	-	-	-	-	-	-	-	-	(64,425)	4,360,564	4,296,139	(308,974)
ASSOCIATED STUDENTS OF WOU																	
TOTAL ASSOCIATED STUDENTS OF WOU		-	-	-	32,095	-	70,279	30,906	133,280	112,079	18,157	-	1,151	(263,516)	-	1,151	0
CAMPUS RECREATION																	
DOS967	Health & Wellness Center	76,500	224,952	-	-	-	208,023	155,492	588,467	196,764	58,644	7,250	366,682	(822,471)	47,845	443,181	1
DOS982	Health and Wellness Programs	13,500	-	-	-	-	43,097	1,509	44,606	8,995	3,967	-	-	(44,068)	-	13,500	-
DOS983	Aquatic Center Operation	-	-	-	-	-	39,788	1,393	41,181	52,654	6,944	-	-	(100,779)	-	-	-
DOS984	Aquatic Center Programs	52,500	-	-	-	-	40,725	1,426	42,151	6,731	3,618	-	-	-	-	52,500	-
DOS985	Intramurals	3,500	-	-	-	-	40,088	1,404	41,492	5,962	3,512	-	-	(47,466)	-	3,500	-
DOS986	Turf and Grass Fields	4,000	-	-	-	-	3,137	110	3,247	21,390	1,824	-	-	(22,461)	-	4,000	-
DOS800	Men's Lacrosse	-	-	-	-	-	-	-	-	13,659	1,864	11,520	-	(27,043)	-	-	-
DOS801	Men's Soccer	-	-	-	-	-	-	-	-	1,837	203	900	-	(2,940)	-	-	-
DOS802	Men's Rugby	-	-	-	-	-	-	-	-	5,131	803	5,720	-	(11,654)	-	-	-
DOS803	Women's Rugby	-	-	-	-	-	-	-	-	3,140	588	4,800	-	(8,528)	-	-	-
DOS804	SORC Rock Climbing	-	-	-	-	-	-	-	-	200	74	800	-	(1,074)	-	-	-
DOS806	Dance Team	-	-	-	-	-	-	-	-	5,561	412	-	-	(5,973)	-	-	-
DOS812	Women's Soccer	-	-	-	-	-	-	-	-	1,837	203	900	-	(2,940)	-	-	-
DOS814	Men's Basketball	-	-	-	-	-	-	-	-	500	37	-	-	(537)	-	-	-
TOTAL CAMPUS RECREATION		150,000	224,952	-	-	-	374,858	161,334	761,144	324,361	82,693	31,890	366,682	(1,097,934)	47,845	516,681	1
CREATIVE ARTS																	
CAD931	Broadway/Opera	-	-	564	-	-	-	201	765	711	110	-	-	(1,586)	-	0	(0)
CAD932	Choral Organizations	800	-	420	-	-	1,894	217	2,531	3,878	1,000	7,100	-	(13,709)	-	800	0
CAD933	Instrumental Jazz	1,050	-	420	-	-	891	182	1,493	10,203	1,296	5,816	-	(17,758)	-	1,050	0
CAD934	Vocal Jazz	190	-	410	-	-	590	167	1,167	4,823	1,013	7,687	-	(14,500)	-	190	(0)
CAD935	Guest Artists	790	-	6,096	-	-	711	2,198	9,005	6,631	1,158	-	-	(16,004)	-	790	(0)
CAD936	Western OR Symphony & Wind Ensemble	278	-	2,753	-	-	1,532	1,035	5,320	9,423	1,536	6,000	-	(22,000)	-	279	(1)
CAD937	WOU Dance Theatre	8,000	-	-	-	-	3,385	119	3,504	27,384	2,917	8,520	1,166	(34,325)	-	9,166	-
CAD938	Theatre	12,000	-	-	-	-	37,112	1,299	38,411	52,370	6,960	3,266	-	(89,007)	-	12,000	-
CAD939	Summer Theatre	-	-	-	-	-	-	-	-	31,440	2,327	-	-	(33,767)	-	0	(0)
CAD941	Instrumental Chamber Ensembles	-	-	-	-	-	-	-	-	6,000	827	5,173	-	(12,000)	-	-	-
CAD942	IFC Art Gallery	735	-	-	-	-	2,800	98	2,898	10,919	1,123	1,350	-	(15,555)	-	735	-
CAD945	IFC Smith Fine Arts - Labor	77,961	40,977	-	-	-	31,612	-	72,589	5,372	-	-	-	-	-	77,961	(0)
TOTAL CREATIVE ARTS		101,804	40,977	10,663	-	-	48,915	37,129	137,684	163,782	25,639	44,912	1,166	(270,211)	-	102,972	(2)
STUDENT ENGAGEMENT																	
SEO901	Student Engagement Operations	171,528	299,928	-	104,070	5,877	170,157	313,614	893,646	269,525	86,667	8,000	482,609	(1,166,837)	80,527	654,137	(0)
SEO902	Leadership, Inclusion, & Activities (LIA)	5,000	-	-	-	-	-	-	-	50,787	4,294	7,240	-	(57,321)	-	5,000	-
SEO903	Student Activities Board	4,546	-	-	-	-	14,000	490	14,490	39,666	4,260	3,400	-	(57,269)	-	4,547	(1)
TOTAL STUDENT ENGAGEMENT		181,074	299,928	-	104,070	5,877	184,157	314,104	908,136	359,978	95,221	18,640	482,609	(1,281,427)	80,527	663,684	(1)
STUDENT MEDIA																	
SEO904	Student Media	-	-	-	-	-	-	-	-	4,050	384	1,131	-	(5,562)	-	3	(3)
SEO905	Northwest Passage	-	-	-	-	-	4,800	168	4,968	3,412	621	-	-	(9,000)	-	1	(1)
SEO906	Western Journal	7,500	-	-	-	-	60,000	2,100	62,100	10,060	5,340	-	-	(70,000)	-	7,500	-
SEO907	KWOU Student Radio Station	150	-	-	-	-	4,841	170	5,011	2,112	528	-	-	(7,500)	-	151	(1)
TOTAL STUDENT MEDIA		7,650	-	-	-	-	69,641	2,438	72,079	19,634	6,873	1,131	-	(92,062)	-	7,655	(5)

Western Oregon University
FY23 Incidental Fee Budgets

INDEX	DEPT NAME	Total Revenue	Unclass Salary (+) Acct 10103	Other Unclassified Pay (+) Acct 10200	Classified Salary (+) Acct 10301	Classified Pay (+) Acct 10400	Student Pay (+) Acct 10501	Total OPE (+) Acct 109XX	Total Personnel	Services and Supplies (+) Acct 20000	General Admin Overhead (+) Acct 28204	Travel (+) Acct 39000	Depreciation (+) Acct 80500	Transfer In (-) Acct 91000	Transfer Out (+) Acct 92000	Total Expense	NET (Ignoring depr.)
STUDENT AFFAIRS																	
DOS923	Interpreters (Access)	-	-	11,680	-	-	-	4,164	15,844	-	1,173	-	-	(17,016)	-	1	(1)
DOS975	SPEAK (Abby's House)	-	-	-	-	-	5,940	208	6,148	-	455	-	-	(6,600)	-	3	(3)
DOS813	Food Pantry	-	-	-	-	-	20,420	715	21,135	-	1,564	-	-	(22,699)	-	-	-
DOS979	WOLF Ride	3,000	-	-	-	-	36,000	1,260	37,260	6,261	3,221	-	8,499	(43,742)	-	11,499	-
TOTAL STUDENT AFFAIRS		3,000	-	11,680	-	-	62,360	6,347	80,387	6,261	6,413	-	8,499	(90,057)	-	11,503	(4)
ATHLETICS																	
JA1101	IFC - Administration	-	-	-	-	-	-	-	-	6,700	496	-	-	(7,196)	-	-	-
JA1501	IFC - Athletic Training	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
JA1601	IFC - Athletic Performance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ji2101	IFC - Football	-	-	-	-	-	-	-	-	108,000	20,202	165,000	-	(293,202)	-	-	-
Ji2201	IFC - Volleyball	-	-	-	-	-	-	-	-	24,000	5,846	55,000	-	(84,846)	-	-	-
Ji2301	IFC-Womens Soccer	-	-	-	-	-	-	-	-	26,500	6,031	55,000	-	(87,531)	-	-	-
Ji2501	IFC - Mens Basketball	-	-	-	-	-	-	-	-	27,000	6,068	55,000	-	(88,068)	-	-	-
Ji2601	IFC - W Basketball	-	-	-	-	-	-	-	-	27,000	6,068	55,000	-	(88,068)	-	-	-
Ji2901	IFC - Baseball	-	-	-	-	-	-	-	-	26,000	8,214	85,000	-	(119,214)	-	-	-
Ji3001	IFC - Softball	-	-	-	-	-	-	-	-	26,000	8,214	85,000	-	(119,214)	-	-	-
Ji3101	IFC - Mens Soccer	-	-	-	-	-	-	-	-	26,500	6,031	55,000	-	(87,531)	-	-	-
Ji4101	IFC - Cheerleading	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ji4201	IFC- M Cross Country	-	-	-	-	-	-	-	-	17,750	5,569	57,500	-	(80,819)	1	(1)	
Ji4301	IFC- W Cross Country	-	-	-	-	-	-	-	-	17,750	5,569	57,500	-	(80,819)	1	(1)	
TOTAL ATHLETICS		-	-	-	-	-	-	-	-	333,200	78,308	725,000	-	(1,136,507)	-	1	(1)
TOTAL IFC		4,430,693	565,857	22,343	136,165	5,877	810,210	552,258	2,092,710	1,319,295	313,304	821,573	860,107	(4,296,139)	4,488,936	5,599,787	(308,987)

Finance & Administration Committee (FAC), June 8, 2022

Quasi Endowment Transfer

WOU has received an additional HEERF SIP (Strengthening Institutional Programs) of \$543,177. With that included, as of the April 30, 2022 management report projected ending fund balance is projected to be \$12.661M, which is 16.90% of revenues. The Board guidance is for ending fund balance to be between 5-15% of revenues, with a target of 10-12%. As such, it is proposed that \$850K (\$550K of HEERF SIP and \$300K from fund balance) is transferred from Education & General fund to be invested in the quasi endowment. Transferring \$850K to the quasi-endowment would result in a new projected ending fund balance of \$11.811M, or 15.77% (as shown on the Management Report).

COMMITTEE RECOMMENDATION:

It is recommended that the Western Oregon University Board of Trustees approve the transfer of \$850,000 of the projected Education & General fund balance to be invested in the quasi endowment.

Interim President Employment Agreement Amendment

At its June 9, 2021 meeting, the Board of Trustees appointed Dr. Jay Kenton as Western Oregon University's interim president as the Board launched the search for a regular successor. At relevant part, Dr. Kenton's employment agreement states:

This Agreement commences on July 1, 2021 and ends, unless terminated as provided elsewhere in this Agreement or upon the successful appointment of a regular successor (the "Term"). Notwithstanding the foregoing, the Parties may agree to extend the term of this Agreement, but only in a writing authorized by the Board and executed by the Parties...For all services rendered by the Interim President hereunder, the Board will pay the Interim President a monthly base salary of \$20,667 based on an annual base salary for \$248,004 at 1.0 FTE..."

The Board anticipates the appointment of Dr. Jesse Peters to serve as the university president and that his presidential employment commences on August 1, 2022. To plan for the transition between Dr. Kenton and Dr. Peters, Dr. Kenton requested an amendment to his employment agreement to move his service to 0.9 FTE during the month of June 2022 and to 0.1 FTE during the month of July 2022.

COMMITTEE RECOMMENDATION

The Executive, Governance and Trusteeship Committee (EGTC) recommends that the WOU Board of Trustees authorize an amendment to the employment agreement with Interim President Jay Kenton in order to change his FTE in June 2022 to 0.9 FTE and in July 2022 to 0.1 FTE. The EGTC further recommends that the Board delegate to the Board Chair or her designee the authority to draft and execute an amendment to Dr. Kenton's employment agreement consistent with this motion.

EGTC, Board Chair Election

Article III, Section 5 of the Board's Bylaws governs the election of Board officers. Currently, the Western Oregon University Board of Trustees has a Board Chair and Board Vice Chair, elected in alternate years for two-year terms. There is no automatic succession or term limits for Board officers.

Last year, the Board elected Doug Morse as its Vice Chair. In anticipation for the election of a Board Chair this year, VPGC and Secretary Ryan Hagemann consulted with trustees individually to determine if any trustees were interested in serving as chair or nominating a trustee to serve as Chair. Chair Komp expressed her interest to stand for re-election as Board Chair.

COMMITTEE RECOMMENDATION

The Board's Executive, Governance and Trusteeship Committee (EGTC) recommends the nomination of Betty Komp to serve as its Chair, for a two-year term, effective July 1, 2022 through June 30, 2024.

WOU Board of Trustees - June 8, 2022 Interim President Kenton's Report

Important Trivia re: did you know that the mid-Willamette Valley is *Oregon's #1 Producer of Agricultural Products – Grass seed, Hazelnuts, specialty crops and hops (Sedcorp)*

Facts & Demographics – Polk County Oregon

(from Polk County's website)



Overview

- Polk County was founded on Dec. 22, 1845
- The County was named for James Knox Polk, the 11th President of the United States
- The County seat is located at [Dallas, Oregon](#)
- Polk County is home to [Western Oregon University](#) and an excellent public school system
- Polk County is governed by a 3-member [Board of Commissioners](#) who serve 4-year terms
- Polk County is a blend of both rural and urban communities, and operates under a detailed [Comprehensive Land Use Plan](#)

Location/Climate

- Polk County is located in the heart of the lush Willamette Valley, approximately 15 miles west of Salem, Oregon
- Residents enjoy a moderate, four season climate with an average of 222 days of sunshine and an average of 52 inches of precipitation each year
- August is the warmest month (Avg. High: 81)
- January is the coolest month (Avg. High: 39)

Geography Quick Facts

- Land Area: 744 square miles
- Persons per Square Mile: 102

- Statistical Area: Salem Metropolitan Area

Demographics

- Population: 79,122 (2010 Census)
- Population Increase 2000 - 2009: 25.2%
- Estimated Housing Units: 27,857
- Median Household Income: \$53,506

My Report:

When I was hired, I told you I was proud of my record of leaving organizations better than I found them and after 11 months on the job I feel assured that this record will remain intact. Thank you for providing me with the opportunity to re-connect with the WOU community. It's an amazing collection of folks in a cohesive community who are hard-working, dedicated, and caring individuals focused on ensuring our students find success in all they do.

We're about to have graduation and there is much to celebrate. Raise your glasses and toast our collective accomplishments detailed below. There is much to be proud of at WOU today.

Gym Floor and Bleachers Project underway in New PE: Due to the funding of the steampipe project, we now can use \$1.6M of the capital repair monies we received in the 2021-22 Legislative session to replace the gym bleachers and floor. This decision had to be made now so the new floor and bleachers can be installed during the summer and be ready for the fall sports seasons for volleyball and basketball. The floor has been sanded and refinished multiple times over its life and now needs to be replaced. The new bleachers will be higher on the wall with different spacing that will permit an ~15% increase in seating capacity. The NPE gym has the largest seating capacity on campus and is used for Athletics, Physical Education courses, New Student Week sessions, the Cesar Chavez conference, and many other yearly events. This project's cost will also count toward the fundraising goal the Foundation is pursuing as it was one of their priorities.

COVID Update: I am hearing of more positive tests from folks at WOU, including my own test and many members of my cabinet. Everyone needs to take added precautions. Guidance is that Individuals have the tools to mitigate their risks if they choose to use them.

The COVID Safety Team has continued to monitor the status of the coronavirus. Here are some updates and reminders:

- Polk County Risk Level / Masking - As you may know, Polk County has moved from low-risk into the medium risk category. Currently, to ensure the health and safety of our campus community we recommend you wear masks when indoors in the presence of others. If Polk County moves to high risk, masks will be required for indoor gatherings of 10 or more people.
- Marcom has created [updated signage](#) for building managers to post and allow for consistent messaging across campus. Building managers, please update building signs to the new “masks recommended” signage.
- **Sanitizing Supplies** - Sanitizing supplies continue to be available to faculty/staff and students. Cleaning caddies are available in classrooms. There are sanitizer stations and masks available in buildings. If you need to request supplies email: facilitieshelp@wou.edu
- You are encouraged to stay home when sick. We have extended the [COVID sick leave policy](#) (80 extra hours of sick leave) to December 31, 2022.

At this time no changes have been made for commencement. We will continue to monitor the county risk level.

Racial Incidents, Anger and Fear – My campuswide e-mail has brought mixed responses with many supporting it, but some have disagreed and felt my e-mail was racist. Some have indicated that they are afraid and want to know what we will do to ensure that Black and Lavender Graduation ceremonies are safe. Most of the Cabinet members plan to attend these events and we have asked Campus Public Safety to increase patrols during these activities. I am also asking you to help where you can; be present, help us monitor the situation, etc. If you see someone harassing another, please intervene if you can and support the person being harassed. Our students have worked hard to get to this point, and they deserve to have a safe place to celebrate their achievements.

We must stand firm in our resolve to speak out against and condemn these racist acts. All people deserve to be treated with the utmost respect. Our attitudes, beliefs, values, and actions need to reflect these core values.

Campus Murals - Western is fortunate to have two outstanding Portland-based artists on our campus this week. One artist, Jahdi Levvy, is currently working on his mural inside the WUC lobby and the other artist, Hector Hernandez, is finishing his art installation outside the Welcome Center. These art installations are celebrations of the various identities represented at WOU. Please give a warm WOU welcome to these artists.

The impetus for the mural in the WUC comes from Movimiento Estudiantil Chicano de Aztlán (MEChA) De Western Oregon University a student organization that promotes higher education, cultura (culture), and historia (history).

The mural is seen as one step towards achieving WOU's goal of cultivating an inclusive campus climate that supports and celebrates the culture of a wide range of backgrounds, ethnicities, abilities, and identities. Jahdi Levvy, a distinguished Portland artist, is working on this beautiful and thoughtful mural.

The second art installation by Portland Artist Hector Hernandez also honors WOU's commitment to diversity, equity, and inclusion. Hector, whose art project is funded through the 1% for Art Program, talks about his artwork at the WOU Welcome Center, building mosaics, and the benefits of higher education. Hector and his crew are hard at work installing the final pieces of the entire artwork. Here's a link to a Hector's video: <https://youtu.be/5k09VJ7liec>

Budget Update – We have a significant structural deficit, more than (\$6M) if we budget a 5% decline in undergraduate enrollment and flat graduate enrollment as recommended by University Budget Advisory Committee (UBAC). I believe that we should budget +5% enrollment in all categories and if we did the deficit would be (~\$3.0M). Getting the enrollment and revenues to grow is critically important for the institution. Today we are just shy of 4,000 students. With our as built capacity we need to operate with a student body of between 5,000-6,000 and doing so would make WOU more vibrant and sustainable.

The budget assumes that all positions currently authorized will be filled for the entire year. But our history tells us that we have had many vacancies that we were having a difficult time filling. Though the job market seems to be improving as many positions are now being filled with high quality talent. Nevertheless, we expect that salary and OPE savings will likely approximate \$1.0M this year and this savings could be applied against the deficit if needed. This would need to be coordinated with the campus as our current practice is to allow departments to use these savings for other departmental needs if not spent on salaries and benefits.

Yet, our costs will likely grow from inflation and significant changes in the labor markets and due to negotiated raises in collective bargaining agreements. Without enhanced state funding or significant tuition increases (which I would not advocate), we must serve more students and grow our enrollments and other associated revenues – indirect cost recoveries, investment income and increased private donations.

We are projecting to end the year this year with a surplus of ~\$12M or ~15-16% of revenues. In addition, we will have \$3.0M in quasi-endowment investments that can be used with Board approval. Our situation is dire, but it is not hopeless. We have more than a fighting chance to overcome these challenges. But we must continue to invest in new programs and people. We must continue to change and adapt, and we must stay focused on building enrollment, other revenues, and fund-raising capacity.

It is also likely that other windfalls will be found. We are currently working with our peer institutions to review some detailed provisions within the various Federal relief acts, with the possibility of millions more in funding becoming available. Now is not the time to panic. Now is the time to focus and work smarter than ever while evolving and adapting to the changing environment.

Speaking of Fund Raising here is the Latest from the WOU Foundation:

- Total Assets: \$29,815,954
- Total Donations ytd: \$2,918,407, which is \$450,000 more than last year!
- We had a great meet and greet event with alumni and friends and the volleyball coaches.
- The Ron DeVolder Celebration of Life and Spring Game were very successful and well attended.
- The Wolves Auction online silent auction is live now, and the in-person event is scheduled for this Saturday, June 4th!

Enrollment Update – as of Monday May 30, 2022, applications were up 12.9% over last year and admits are up 6.6% over last year with 536 pending applications that are either incomplete in terms of documentation or that require additional review and consideration. EAB is working hard to find added graduate and returning adult students and Shorelight is recruiting international students for WOU and have produced 3 international student applications to date. We were hoping for 10 so we’re making progress. We are also working on improved orientation and advising processes that should improve both yield and retention/persistence efforts.

Fall 2022 Applications and Admissions Report

As of May 30, 2022

<i>Applications</i>	<u>Fall 2022</u>	<u>Fall 2021</u>	<u>% Chg.</u>
African American	89	110	-19.1%
American Indian	31	30	3.3%
Asian/Pacific Islander	207	172	20.3%
Hispanic/Latino	1,019	730	39.6%
Unknown ethnicity	280	312	-10.3%
White	<u>1,458</u>	<u>1,298</u>	12.3%
Total Freshmen	3,084	2,652	16.3%
Undergraduate Transfers			
Freshmen	137	144	-4.9%

Sophomores	255	127	100.8%
Juniors	115	242	-52.5%
Seniors	<u>15</u>	<u>38</u>	-60.5%
Total Transfers	522	551	-5.3%
Post-Bac Non-Grad	<u>19</u>	<u>12</u>	58.3%
Total Undergraduates	3,625	3,215	12.8%
Masters	179	155	15.5%
Post-Bac Grad	<u>-</u>	<u>-</u>	0.0%
Total Graduates	179	155	15.5%
Total Applicants	3,804	3,370	12.9%
Admitted			
African American	67	86	-22.1%
American Indian	21	23	-8.7%
Asian/Pacific Islander	160	141	13.5%
Hispanic/Latino	766	592	29.4%
Unknown ethnicity	203	275	-26.2%
White	<u>1,113</u>	<u>1,103</u>	0.9%
Total Freshmen	2,330	2,220	5.0%
Undergraduate Transfers			
Freshmen	75	50	50.0%
Sophomores	233	111	109.9%
Juniors	101	209	-51.7%
Seniors	<u>13</u>	<u>29</u>	-55.2%
Total Transfers	422	399	5.8%
Post-Bac Non-Grad	16	9	77.8%
Total Undergraduates	2,768	2,628	5.3%
Masters	82	47	74.5%
Post-Bac Grad	<u>-</u>	<u>-</u>	0.0%
Total Graduates	82	47	74.5%
Total Admitted	2,850	2,675	6.5%

Pending:

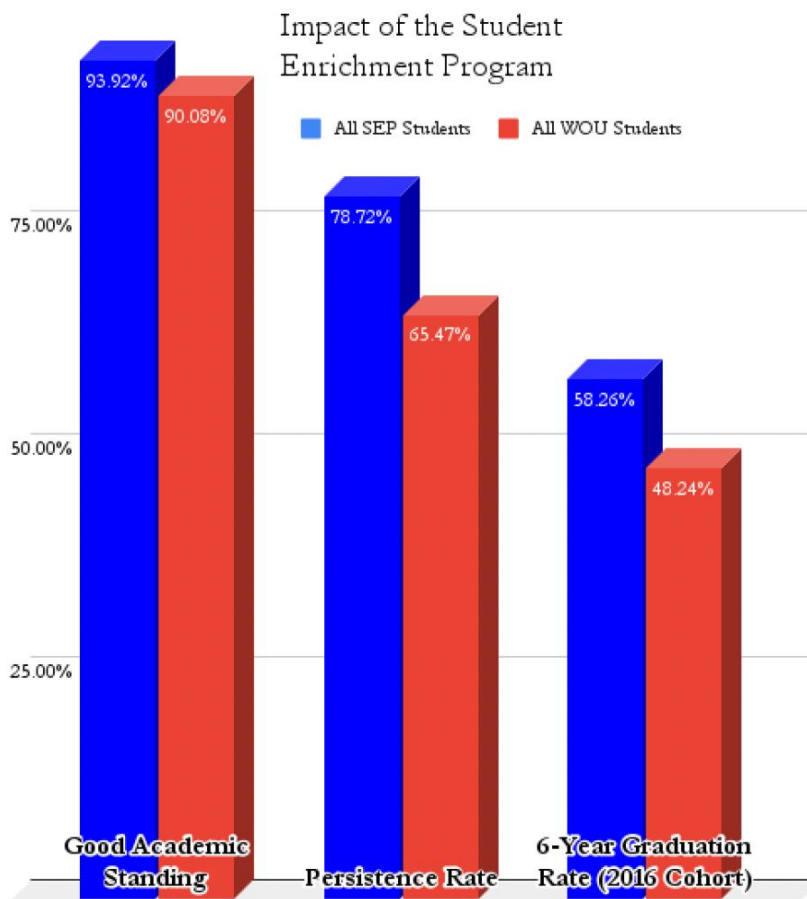
African American	14	18	-22.2%
American Indian	4	3	33.3%
Asian/Pacific Islander	22	7	214.3%
Hispanic/Latino	141	65	116.9%
Unknown ethnicity	39	20	95.0%
White	<u>178</u>	<u>80</u>	122.5%
Total Freshmen	398	193	106.2%
Undergraduate Transfers			
Freshmen	56	90	-37.8%
Sophomores	4	7	-42.9%
Juniors	1	25	-96.0%
Seniors	<u>-</u>	<u>6</u>	-100.0%
Total Transfers	61	128	-52.3%
Post-Bac Non-Grad	2	2	0.0%
Total Undergraduates	461	323	42.7%
Masters	75	85	-11.8%
Post-Bac Grad	<u>-</u>	<u>-</u>	0.0%
Total Graduates	75	85	-11.8%
Total Pending	536	408	31.4%

Housing reservations for Fall 2022 are currently at 768. We had 811 at the start of Fall 2021. We are hoping to get ~900 reservations for Fall 2022, thus have 3.5 months to get another 143 reservations for a 10.9% increase over the prior year. Housing reservations are a good predictor of enrollment. Our auxiliaries could use an infusion of funds to rebuild reserves, address deferred maintenance, and address myriad needs.

- **Athletic roster adjustments** have been made adding 30 slots, plus Men's soccer.
- **GNAC Championship Update-** The women's track & field team won the GNAC Outdoor Championship for the first time since 2008. Baseball earned a share of the regular season title before winning the GNAC tournament and qualifying for the NCAA playoffs. The WOU men's and women's teams finished 4th (out of 10) in the 2021-22 GNAC All Sports Trophy standings.
- **Men's soccer update:**
 - 47 committed student athletes for Fall 2022. These students are registering for classes and completing all action items with great eagerness. The Fall team travel arrangements are in place, equipment and uniforms are ordered and we are ready to begin our first competitive season in a few months.

- Current on-campus or virtually attending student athletes are helping get the word out about WOU and the program through social media and face to face contact. The spring ID camp drew nearly 40 student athletes from Arizona, California and other neighboring states. We are preparing to host joint camps with the women's soccer coaches in satellite locations and hoping to continue the growth of our programs through wider recruitment initiatives.

Improved advising, retention, and persistence – the hiring of Paige Jackson, and the merger of Student Success and Advising (SSA) with the Student Enrichment Program (SEP) led by Chris Solario and Teachers Preparation Student Support Services (TPSSS) led by Jen Koshnick means we can apply best practices in all advising and leverage the efficiencies of having more advisors available for registration/orientation events, etc. We also hired a new professional advisor for the Business program who works with Paige and her team.



Partnership specialist – We are fully approved and authorized to participate in the Amazon Career Choice program whereby Amazon employees can take courses at WOU and be reimbursed by Amazon. We have already begun to receive vouchers from

Amazon employees interested in taking courses at WOU. We are also close to finalizing a partnership with SEIU offering a 20% off tuition discount to their members.

Cross functional enrollment team – now Chaired by Tina Fuchs, Interim VP Student Affairs the members include the President, Provost, VP Finance, VP Student Affairs, Vice Provost, Dean of Graduate Studies, Registrar, Bursar, Director and assistant directors of Admissions and Financial Aid, Director of Student Success and Advising, Housing Director, Director of Graduate Student Success & Recruitment, New Student and Family Programs Director, Director of University Computing Solutions, Registrar, and Partnership Specialist. This group continues to meet every other week for 90 minutes to hear report outs on various initiatives and to discuss policies, and practices, coordinate activities, plan events, etc.

Increased fee remissions – we have increased the number of Bilingual and Diverse Teachers fee remissions from 50 to 100 as this is a priority for the State. We also have been using RNL to assist us in optimizing fee remission awards to obtain more prospective students in the coming years. This year we are on track to spend \$4.5M - \$5.0M in fee remissions though we budgeted \$5.5M for this purpose. We are being too conservative in our awarding of fee remissions and are losing students as a result. While it's hard to predict the actual disbursements relative to the awards, and this gets more difficult as we change the programs and policies each year, we need to do a better job of this as it's hurting our enrollment.

WOU needs stronger ties to Community Colleges and the Tribes in Oregon.

Community college enrollment has fallen from 34,384 FTE in 2012 to 19,244 in 2021 – a 44% reduction in the last 10 years. Nevertheless, WOU needs to strengthen its ties to especially PCC (largest CC – new president) and Clackamas (President Tim Cook is a WOU alum) and possibly Lane (3rd largest CC), Mt. Hood (4th largest) and Umpqua (Michael Reiss has a relationship as we provide academic innovation services to Umpqua CC). WOU has good relations with Chemeketa (2nd largest CC in Oregon) and Linn Benton community colleges which are our largest feeders.

We also need to improve our relationships with the Tribes in the coming year. Given his background, this is an area where I believe Dr. Peters will excel. Oregon's nine tribal governments are separate sovereigns with powers to protect the health, safety and welfare of their members and to govern their lands. (Source: Oregon Blue Book 2022)

Burns Paiute Tribe

Confederated Tribes of Coos, Lower Umpqua and Siuslaw

Coquille Indian Tribe

Cow Creek Band of Umpqua Tribe of Indians

Confederated Tribes of The Grand Ronde

Klamath Tribes

Confederated Tribes of Siletz Indians

Confederated Tribes of the Umatilla Indian Reservation

Confederated Tribes of Warm Springs Reservation

WOU needs to strengthen its relationship with each of the tribes in Oregon, and especially with the Siletz and Grand Ronde tribes who are closest to WOU. The State just implemented a new financial aid program for Tribal members thereby opening the doors for their members to be better able to afford an education.

Public Employer Job Fair in June we have been working with the All-Hands Leadership group (comprised of mayors and city managers from Monmouth and Independence, the Superintendent and key staff at Central School District, WOU, Polk County Fire District, local elected officials – Sen. Patterson, Rep. Evans, Polk County Commissioner Jeremy Gordon, SEDCOR's Alex Paraskevas, Rural Innovation Catalyst and Business Retention and Expansion Manager for Polk County). Working with this group we plan to participate in a public employer's job fair to be held at the Polk County Fairgrounds in June (date pending at the time of this writing). This will be the first public employer job fair ever held in Polk County and people are excited to see how it goes. WOU will be staffing a table at the event and will have WOU swag and other information available about open positions, benefits, etc. for attendees.

WOU is lucky to be part of the All-Hands leadership group as it addresses many town and gown issues, provides opportunities to provide or receive help from the others, good opportunity to share issues of common concern – racism, safety, major events, and activities coordination, etc. It is nice to know you have other groups in the community who are available to celebrate your successes or assist with a crisis when needed.

Searches for VP Advancement and University Relations and Executive Director of the WOU Foundation, Executive Director of Human Resources and other key leadership vacancies will provide an opportunity to rebuild key functions in a more strategic manner. This facilitates re-assessing the importance of these functions, making investments or reductions, refocusing, and implementing current best practices. These opportunities will surface in the near term in the following areas:

- Fund Raising and Development
- Marketing and communications
- Human Resources – both the Executive Director and the Deputy
- Legislative Relations
- Student Affairs

These six searches represent an annual investment of more than \$1.0M in support of their salaries and associated other payroll expenses. Getting the right people will be key.

- Search: Vice President for Advancement and University Relations and Executive Director of the WOU Foundation
 - Chair: Ryan Hagemann
 - Members:
- Search: Executive Director or Vice President of Human Resources
 - Search co-chairs: Michael Reiss and Rebecca Chiles
 - Members:

Both searches will be assisted by a search firm. We are presently evaluating six proposals and awaiting committee scoring before awarding a contract.

We will also need searches for the next Director of Government/Legislative Relations and Director of Marketing/Communications but we're assuming that the VP Advancement and University Relations would want to recruit these people.

We will also need a search for the Deputy Director of Human Resources.

Finally, Student Affairs has an interim VP yet is led by an extremely competent and capable individual.

Ethnic Studies Program Report – multiple folks, faculty, staff, and students have told me how important it is for WOU to have an ethnic studies program, especially given our pursuit of full HSI status. I asked Mary Pettinger to take this on and as per usual she has excelled in leading a passionate group in developing the following program proposal. This program will need to be reviewed and approved by the Faculty Senate, the Board, and the HECC thus will not start until Fall 2023. Here is Mary's latest update:

The Ethnic Studies committee has made significant progress toward creating an Ethnic Studies program at WOU with several important actions:

- First, the new major and minor in Ethnic Studies have been created. The major will require 60 credits of coursework in a core, five concentrations (Chicanx/Latinx and Latin American Studies, African American and African Studies, Global Ethnicities Studies, Indigenous Studies and Intersectionality) and electives. We have received very positive feedback from students and community members expressing their appreciation and support for its design. We have four more of the core courses to design (with the ETH201 Introduction to Ethnic Studies ready). Our timeline is to finish and submit the program and course proposal for curriculum review beginning in September.
- Second, the committee has met with the WOU General Education committee about the possibility of adding a new Ethnic Studies course, a new Justice/ Diversity category, and/or integrating Ethnic Studies into First Year Seminars. We have agreed to meet again in the fall to assist in the creation of the new area.
- Third, committee members are coordinating future activities with the College of Education regarding the new Ethnic Studies requirements for teachers, the Academic Innovation team regarding course delivery, and community members to build contacts for future practicums and a possible advisory board.

- The committee members have expressed their willingness to continue working over next year to expand the program, and its internal and external community connections, and we look forward to students being able to major or minor in Ethnic Studies in Fall 2023.

Morphing the curricula to address current and emerging needs:

As for curricular decisions, here are the new programs and certificates that were approved by Faculty Senate during 2021-2022 (this doesn't include new concentrations in existing majors or program modifications):

New Degrees

- Bachelor of Science and Bachelor of Applied Science in Data Analytics
- Occupational Therapy Doctorate
- Master of Science in Human Performance and Wellness (finishing external review process)
- Education Doctorate in Interpreting Studies (beginning external review process)

New Minors

- Criminal Justice Minor
- Cybercrime Investigation and Enforcement Minor
- Exercise Science Minor

New Certificates

- Graduate Certificate in Writing Theory & Practice for In-Service Teachers
- Undergraduate Certificate in Computational Linguistics

Sponsored projects – this is an area of growth and pride for WOU. Most of the projects are public services or contractual services provided by WOU personnel to various governmental, public, and non-profit entities. With the pandemic came lots of funding opportunities. The dollar volume of the aggregate grants and contracts is growing as are the indirect cost recoveries that come with these projects. WOU recently revised its indirect cost recovery revenue sharing agreement with the principal investigators, divisions and other support units benefiting from these monies. The Sponsored Projects Office is overseen by Dean Hillary Fouts and Eric Dickey is our Pre-Award Manager who works closely with our faculty and staff who develop these proposals. All these folks deserve the credit for this growth and evolution.

Proposal activity, comparing FY21 to FY22

	# of Proposals Submitted	Funding Sought	# of Proposals Awarded	Funding Awarded
By May 2021	54	\$10,663,055	33	\$2,741,654
By May 2022	67	\$38,309,221	22	\$12,814,296

- We are continuing to see an upward trend in grant submissions and funding awarded. As of May 2022, 67 proposals have been submitted seeking close to \$38.3 million in external funding. Of these FY22 proposals, 22 have been funded so far for a total of \$12.8 million in external funds. For comparison, by May 2021, 54 proposals seeking close to \$10.7 million in external funding had been submitted and close to \$2.7 million had been awarded by this time last year. In sum, as of May 2022, we have been awarded \$10 million more in external funding compared to FY21, which is a 400% increase in funding awarded.
- In addition to the growth of direct fundings, indirect funding has also grown this year. The \$12,814,296 of funded awards so far this year, includes \$2,078,541 of indirect funds. This time last year, the awarded funding included \$291,160 of indirect funds and by the end of FY21 the awarded indirect cost recoveries was \$1,600,156. Thus, FY22 awards have already exceeded the total direct and indirect funded awards for FY21.
- Indirect cost recoveries are shared with PI, Division/Centers, and Colleges and help fund institutional overhead.
- Noteworthy recent awards:
 - Robyn Lopez-Melton, Director of the Center for Learning and Youth Development (CELYD) in TRI, received an \$8.4 million (including over \$1.4M in indirect funds) award from the Oregon Department of Education Early Learning Division to design, implement, and manage Oregon’s first statewide childcare substitute system.
 - In addition, Multnomah County's Preschool for All has approached CELYD for a partnership with the new substitute system. They are planning to award close to \$500K to CELYD that will fund 3 full time positions at WOU to work in Multnomah to increase the availability of culturally responsive substitutes that can work in all types of childcare programs across the county.
 - Under the leadership of Director Shondra Russell, WOU has been selected to continue to receive funding through the federal TRIO Upward Bound grant for another five years. The anticipated funding of \$1,488,005 will allow us to continue building on the success of the past 23 years in serving low-income and potential first-generation high school students.
 - Patrick Aldrich and Beryl Neequaye in TRI’s Center on Evaluation, Technology & Research were awarded \$120,000 from the Oregon Department of Education to conduct an evaluation of Oregon’s Tribal Attendance Promising Practices (TAPP) project, which is aimed at strengthening attendance and student success, and increasing graduation rates among the nine federally recognized Tribes in Oregon.

Technology utilization to enhance service to students/campus, improve productivity, and provide better information for decision-making. The following initiatives have been underway this year:

- Wireless - Ten-year-old wireless access points are being replaced with new WiFi 6 access points, providing faster speeds and will support a greater number of concurrent students, faculty, staff, and visitors; along with compatibility with current technology.
- Banner Financial Aid - For the first time, this October Financial Aid will be an integral part of Banner, our enterprise resource planning (ERP) system. This will provide a tight integration between Financial Aid, Account Receivable, and other Banner modules. This project will provide significant streamlining of processes, while increasing productivity. Also included with this implementation is the ability for students to have real-time access to their financial aid information including:
 - Financial Aid Dashboard
 - Financial Aid Award History
 - Financial Aid Award Offer
 - Financial Aid Notifications
 - Financial Aid Resources
 - Financial Aid Satisfactory Requirements
 - Financial Aid College Financing Plan
- Slate in Admissions and Graduate Studies - Slate has provided the opportunity to provide students with a more efficient and user-friendly front end to applying to WOU Plus it offers bi-direction data sharing with Banner.
- Adobe Sign - Adobe Sign provides secure signing of contracts and other documents requiring signatures, both external and internal to WOU. This software includes serial and parallel workflow capabilities. This product also provides a significant increase in productivity
- Document Management - DocStar, our document management system continues to be rolled out to reduce paper processes. A significant number of paper processes have been eliminated in the Human Resources office, University Computing Solutions, Business Affairs, and others. DocStar has been integrated with Banner, Microsoft Power BI, and other applications. An example of using this integration would be clicking on an invoice number in Banner and pulling up the original documents in DocStar. This is another example of how efficient solutions continue to be rolled out.
- PeopleAdmin - PeopleAdmin will streamline the hiring process. Applicants will have a streamlined user experience providing them the opportunity to apply for several positions without having to re-enter redundant information. Information will flow seamlessly from applicant tracking and workflows, to Banner integration of applicant and position data. PeopleAdmin is currently in the implementation phase, a joint project between HR, UCS, and PeopleAdmin professional services.
- Data-warehouse - The warehouse is built with reporting efficiency in mind. As an example, early on there was a finance report that took six hours to run in Banner. When it was optimized in the warehouse, the run time was less than one minute. There is significant financial reporting that comes from the warehouse.
- Extending the life of Dell computers - There had been reports that 2016 – 2019 computers were taking five to ten minutes from login to full functionality. For

\$50/computer, UCS was able to upgrade each workstation, replacing the spinning hard drive with a solid state NVMe drive. This change significantly decreased the login time, which is now ten – twenty seconds. With a minimal investment, there was a significant increase in productivity.

- Cyber-security - Through our cyber-security efforts, we have block thousands of attempts from bad-actors that attempt to harm our computing infrastructure. Training has been developed and provided to the campus community to educate them on how to be vigilant and protect themselves.

Better communications – with prospective students via social media use, etc. and with public via other venues (Paula, Sarah, Denise, Danielle and the team are awesome)

- Enhanced presence on social media: We continue to post regularly on current events, items of interest, and recognition of significant occurrences, but we are also amplifying other WOU event posts, such as the library's recent week of BIPOC events. We have 4 student workers helping us make reels. We are currently posting (as appropriate) on LinkedIn, Facebook, Instagram and Twitter. Twitter is our least active and we plan to replace it with Pinterest this summer. We continue to increase our Instagram followers: over 6100, Facebook: over 11,000, Twitter: just over 4,900, and LinkedIn: over 22,000. Instagram and FB are the most popular sites for the students to interact with. Twitter has very little interaction and neither does LinkedIn. We've started a TikTok page to gauge how well that would work for us. With us doing more reels on Instagram, some of those are transferable to TikTok
- Now that we have Olga Walmisley-Santiago on board as Translator we are going to start double posting in English and Spanish wherever possible on social media. English first followed by Spanish. We might consider this format for all our important campus communication: English version followed by the Spanish version. It will add an extra step but I think it would be worth it.
- Admissions successfully tabled at Redmond, OR at the Latin Festival there at the end of April. We got about 15 people who registered for more information about WOU. We selected a grand prize winner who came to WOU (prospective student and parent), stayed the night, had 2 complimentary meals, did a WOU tour, and then went to the ballpark in Keizer to see the Campesinos play. Admissions put together a wonderful gift basket for them as well. We learned that the prize wheel is a huge draw and using it made people come to our table. We unpacked with the Admissions employees who did the tabling of what worked and what didn't. Based on their recommendations, we ordered more swag for our upcoming tabling events. We also created a tabling checklist, and we are planning an orientation for future tablings to let them know what to expect.
- We have several events planned for the summer:
 - 6/11-12: Taste of Woodburn (sponsor and booth)
 - 6/24-26: Salem World Beat Festival (sponsor and booth)
 - 7/2-4: City of Monmouth 4th of July (booth)

- 7/4: City of Independence 4th of July (sponsor and booth)
- July/August Music in the Park series, Monmouth Amphitheater, banner Wednesdays
- July/August Rivers Edge concert series, Independence Amphitheater (sponsor) Thursdays (Movies) and Fridays (live music) (we can table at the events, so I contacted Alyssa Rollins to see if any campus groups want to table)
- 7/9 Western Oregon Night at the Keizer Volcanoes Ball Park (giving 1000 water bottles to the first fans in the gate) (giving away 100 tickets to our WOU faculty and staff)
- 8/20-21 Independence Fiesta (sponsor and booth). Independence was thrilled to have us, expressing that they have wanted WOU out there for a long time. They also indicated that if we were interested in doing some shared advertising that would benefit us both, they would love that. They also have 5 businesses that would like to be a part of the WOU Wednesdays.

Our slides and videos continue to run at Battle Ground, Sandy, Stayton, Dallas, Salem, and Independence Cinemas. Video ads will begin in Hillsboro/Evergreen Theater in July.

- We have 3 banners at 3 ball fields through Kids Inc, 1 banner in the Dallas Aquatic Center, and 1 banner on the Dallas Pickleball fence.
- We are planning on doing a fall event where Wolfie goes to each business for a photo op.
- We are planning community outreach to the Latin communities of Independence, Salem, and Keizer for each term beginning in the fall. We are also planning outreach to the local elementary schools wherein we have Wolfie come to each class, take a pic, give the class a banner, and hand out Wolfie age-appropriate goodies. Pics will be developed and gifted to each class for their classrooms.

New Faculty in Sociology, Business, Computer Science and two in Education: At the beginning of the year, we authorized five faculty searches in high need/return areas. Here is an update from the departments:

- Update from Mary Pettinger: The Sociology search was successful. Rebecca Phillips will be joining us from The Ohio State University where she earned her Master of Social Work and is ABD for a PhD in Social Work (August 2022). She worked for 5+ years in the field and has a Masters of Arts in Child Studies and Human Development from Tufts University. In addition, she is the Lead Investigator for a statewide study of the Children Services Workforce for the State of Ohio, including a \$30,000 grant for research. She will be teaching the new Social Work courses for the Sociology department and helping to expand offerings in future years. The Sociology department is very grateful for the new position and is looking forward to the new opportunities that have been created.
- Update from Bojan Illeveski: Business extended an offer to our top choice yesterday. I should have an update by the end of next week. It has been a reality

check of where salaries for business faculty stand. His 9-month and 12-month (MBA director) salaries are \$170k and \$220k, respectively. I hope the move to Oregon significantly outweighs the pay cut he'll have to take. More to follow. If he accepts he will become our highest paid faculty member.

- Update from Breann Flesch: The Computer Science Division had a successful search with hiring our top candidate. Alex LeClerc is a WOU alum currently finishing their PhD at Oregon State University and will join us in the fall. Their research spans cybersecurity, intuitive design (front-end and back-end), re-usability, end user experience and accessibility. They are poised to contribute to the Computer Science program, Cybercrime Enforcement and Investigation program, as well as our new Data Analytics program starting this fall.
- Update from Dean Mark Girod: The Deaf and Hard of Hearing Education search failed as we were not able to secure any qualified applicants.
- Update from Dean Mark Girod: The Special Education search was successful and we hired our first choice. Dr. Dani Lane will be joining us from Elon University where she coordinates a residency program in partnership with a large school district. We look forward to having her expertise as we open new undergraduate pathways in special education to serve the needs of Oregon school districts.

Special Shout Out: I have to give a special shout out to Anna Hernandez Hunter. I asked Anna to be Director of Admissions when I got here, and she has responded and has given it her all this year. She has recruited a great staff and has learned much this year. I am happy that she signed on for another year as she is perfecting her techniques for the betterment of WOU. She has exceeded every expectation I had and is deserving of special thanks. Thank you, Anna, eres fantastica!

Updated Challenges

- Political – new Governor, President of Senate, etc. Lots of turnover and loss of institutional memory, but the Speaker of the House, Dan Rayfield is a WOU alum.
- Financial – we have a significant structural deficit (\$6.0M+) and must grow enrollments in the absence of the Federal support we've had in the past.
- Declining graduates and increasing competition for students – RNL projections show nationwide decreases in high school graduates starting in 2025. Competition for students is real and must be countered.
- Questions re. Value proposition/benefit of higher education vs. the cost
- Deferred maintenance is a growing concern, especially in auxiliaries such as housing and food services.
- Cost control/growth and funding to lift the burden on students – 85% of our costs are in people; another 5-7% covers utilities, leaving little meaningful opportunities for savings in other areas.

- Data – we have not had a robust institutional research office until this year. We are behind and need the analytical tools and data sets to analyze and make data driven decisions. It's in process and ready to jump.
- Change quotient – WOU is slow to change and adapt – we must remain in alignment with the external environment. We must pick up the pace of change.
- Program portfolio – needs to adapt to current realities. Need more emphasis in building career ready skills in our graduates. The benefit of higher education needs to provide a return on investment in both in real and nominal terms. Internships and other work experience while attending college helps prepare graduates for work after graduation.

Updated Opportunities

- People
- Place - Mid valley, beautiful campus, central location proximate to metro area and population centers, near businesses and government offices
- Partners – school districts, Chemeketa, other regionals, Foundation, All-Hands Group
- Our priorities are aligned with the State's priorities, and this will serve us well in the Legislature:
 - Bilingual and Diverse Teacher preparation
 - Largest producer of new teachers in the State at a time when there is a critical teacher shortage
 - Serving the deaf, hard-of-hearing and blind populations
 - HSI and serving more under-represented, first-generation students
 - Growth in sponsored projects in partnership with the State and Federal governments
 - Public employee workforce development
- Reorganizations – change is positive and hiring these key leaders can be used strategically realign and transform the institution. Folks are ready for change.
 - Advancement and University Relations
 - Marketing and communications WOU's public face
 - Legislative relations – capital projects, legislation, budget, etc. – managing our largest donor
 - Human Resources – need both an Executive Director and Deputy Director – this can transform the institution and rebuild our spirit de corps, build our capacity and provide a better work environment for our people – our most valuable asset.
 - Student Affairs – VP decision – you can't find a better person than Tina.
 - Advising - SSA, SEP, Teacher Prep SSS
 - Athletics - Campus Recreation and Wellness
- New strategic plan to shape curricula going forward; new programs being added
 - Occupational Therapy
 - Interpreting Studies

- Expansion of business program
- Other?
- HSI – a new beginning; a reason for being.
- Cross functional synergies – we are working together better - TEAM synergies – working Together Everyone Accomplishes More – building the capacity and the practice of horizontal communications to increase effectiveness and synergies.
- New leadership
 - President
 - Board members
 - Administration – Advance and University Relations, Executive Director of HR, Deputy Director of HR, Marketing and Communications, Government/Legislative Relations, and Student Affairs
- Labor relations and campus morale
 - Grievances and arbitrations are settled
 - Contracts are in place for next year
 - Trust, hope and optimism are growing

Conclusion: WOU has many challenges, yet an equal number, if not more opportunities in today's turbulent environment. The institution is well-positioned and is full of caring, intelligent, hard-working and well-intentioned people. The world and institution have undergone tremendous change of late and many uncertainties and concerns remain, thus WOU must remain nimble and responsive in this environment. The sky's the limit – aim high and fasten your seat belts you're about to go on the ride of your life.

Thank you again for providing me with the opportunity to spend my last year working with such a great group of folks. It has been a pleasure and I really appreciate serving at the best, last. Welcome Jesse! Godspeed to WOU!

In your service,

Jay