



## Board of Trustees Meeting – November 15, 2023

### Appendix B

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**FROM:** Maureen Brakke, Director of Marketing & Communications

**TO:** Western Oregon University Board of Trustees

**RE:** November Board Update: Marketing & Communications

- ***Increased Media Interest in Western:*** Western has experienced a surge in media interest, with notable coverage and mentions in the various local and state news outlets. This heightened visibility in the news is expected to continue due to the increased number of press releases pitched and sent to the media.
- ***Western Featured in Oregon Business Magazine:*** Western will be featured in an upcoming article in Oregon Business Magazine, focusing on Hispanic-Serving Institution (HSI) updates and first-generation student experiences.
- ***Filming completed for "The College Tour" TV Series:*** Western completed filming for an episode of "The College Tour," an award-winning Amazon Prime TV series that provides an authentic look at college life through the eyes of its diverse student body. The episode featuring Western is scheduled to launch on The College Tour app in January 2024 with plans for a celebratory launch and viewing party. The episode is expected to be on Amazon Prime in May 2024.
- ***Increased production of Alumni Success Story Videos & Using them strategically:*** Western has been highlighting the successes of its alumni through engaging video profiles. These are sent out in press releases and posted on social media and will also be used in additional digital marketing.
- ***Streamlined internal communications via @WOU newsletter:*** Western is streamlining internal communications through the bi-weekly @WOU internal newsletter. This approach aims to reduce campus-wide email communications by consolidating announcements and updates into a single, accessible newsletter. The feedback received after two editions has been highly positive.
- ***External Newsletter "WolfBytes":*** The second edition of the external newsletter, "WolfBytes," was successfully sent out to over 97,000 subscribers on Oct. 2. This publication, with a message from President Peters and the latest news and events from Western will be a consistent monthly feature.
- ***Increased Social Media Engagement:*** Western's social media presence has seen substantial growth, with high levels of engagement observed in certain posts throughout September. In some instances, there has been a remarkable 140% increase in engagement, demonstrating a vibrant online community that's hungry for more!
- ***Launch a robust digital marketing campaign in January 2024 that will positively impact enrollment growth:*** A comprehensive digital marketing campaign is in progress, encompassing streaming video ads, social media ads, digital ads, SEO, and Google AdWords. Billboards will also be utilized for maximum impact.
- ***Devise academic program-specific marketing strategies:*** Collaborative efforts with the academic side are underway to develop program-specific marketing strategies, ensuring a tailored approach to promoting Western's academic offerings.
- ***Launched the academic program webpage project:*** We've launched the unified academic program webpage template project, where the goal is for each academic program webpage to have a uniform design to make it easier for prospective students and others to get the information they need.
  - Currently working with the business and humanities departments.
  - User testing will be implemented to ensure optimal functionality and usability.



Western Oregon University Board of Trustee  
Academic Affairs : Highlights  
November 2023

### Highlights

- First-year retention rate has climbed to 76%— the highest rate since 2005
- Federal, state, *and* private grant funding are all at the highest level in ten years, totaling over 18.5 million dollars.
- The Open Educational Resources program has saved students over \$3.5 million in the past four years by adopting low- and no-cost course materials. The number of sections designed as low- or no-cost increased by almost 50% from the 2019-21 to 2021-23 bienniums.
- Faculty and staff had 94 publications this last year, in addition to many other scholarly activities such as artistic performances and exhibitions, conference sessions, and workshops.
- The College of Education won the Frank Murray Leadership Recognition award from the Council for the Accreditation of Education Preparation, which is given to educator programs achieving accreditation with no stipulations or areas for improvement.
- Collaboration across campus allowed us to secure a \$2.3 million Title III grant which will focus on student success and retention.

### Provost Priorities for the Academic Year

#### Identify and address barriers to success among our students, faculty, and staff.

- Address how our existing institutional grade policy negatively impacts our student's success, retention, and graduation.
- In collaboration with faculty explore best practices of teaching modalities and implications to student success. Develop the Center for Teaching and Learning.
- Develop, support and enhance teaching, learning, & scholarship.
- Develop a mechanism for continuing education and professional development for faculty and staff.
- Develop an Academic Plan for 2024-2025 that aligns to WOU's Strategic Plan

**Academic and Student Affairs Committee (ASAC) Report - Fall 2023**  
*submitted by Tina M. Fuchs, Vice President for Student Affairs*

### **Enrollment Strategies**

The Vice President for Student Affairs and the Dean of Graduate Studies and Research co-chair the Enrollment Strategies team, which is made up of a representative group of campus community members across disciplines who work together to formulate strategy relative to recruitment and retention. The theme, “Enrollment is everyone’s responsibility” has been the guiding principle behind our work.

The team has been in place for over two years, with the ultimate goal to break down silos, communicate more effectively, and work collaboratively to enhance our overall efforts around recruitment and retention. With recruitment and enrollment efforts trending positively this past recruitment cycle, all signs indicate this group is serving its purpose.

- Admission, Financial Aid, and Housing numbers were all up this past recruitment cycle
- Retention is on the rise thanks to collaborative work between Academic Affairs and Student Affairs (particularly noteworthy – the relationship between New Student & Family Programs and Academic Advising)
- Enrollment projections are trending positively for Fall term 2023 - see Enrollment Report - Day 15 in the [ASAC Supplemental Report - Fall 2023](#) (page 1)

As we begin our efforts to recruit the next class and focus on retention of current students, the Enrollment Strategies team is embarking on an important initiative, the development of a Strategic Enrollment Management Plan, replacing the 2018-23 plan currently in place. Goal for completion is the beginning of January 2024.

### **Admissions**

- **Staffing Updates**
  - New team members this year include Jamiere Abney, Director; Nancy Montecinos, Lead Counselor for Visitation and Events; Faith Herrera, Admission Counselor; Jessica Cruz, Admission Counselor.
  - Ricardo Acevedo-Solis promoted to Lead Counselor for Multicultural Recruitment
  - One position open: Assistant Director
- **Strategy Updates**
  - Out-of-State Recruitment
    - Continuing our efforts in Washington, Hawaii, & Idaho, while reintroducing ourselves to California schools
    - Building more of a bridge into Texas to promote the Texas Tuition
    - Ultimate goal: engage all WUE affiliated states

- Broaden Outreach & Communication
  - Partnership with Office of Marketing & Communications on:
    - [New Hype Video](#)
    - New primary recruitment, 1-page handout
    - Updated presentation
  - Retain/Revamp virtual options (i.e. webinars, livestream events, panels, etc.)
  - Join [Common App](#) to boost application numbers:
- Critical Assessment of Campus Tour options:
  - Introducing [YouVisit](#) virtual tour via EAB vendor contract
  - Discussing adding a formal presentation for ALL on-campus visitors (*currently only offered to school groups*)
- Introduce an Enrollment Deposit:
  - \$150 fee that will go towards students' tuition and other fees
  - Secures that they will attend WOU for Fall 2024 and beyond
  - Will also help student service and communication by being able to more directly track their process from applicant to enrolled student (*previous forms were all optional*)
- **Access, Inclusion, & DEI focused Recruitment**
  - New Lead for MC Recruitment to learn more about TRIO & other on-campus DEIA resources
  - Outreach to local and regional Community Based Organizations (CBO) focused on college access (Local example: [Black United Fund of Oregon](#))
  - Direct-Admissions
    - On-going state-level conversation about thresholds for all Oregon Public Universities (OPUs) to provide admission to students who meet base-level criteria
    - Admissions is also exploring a general direct admission through the vendor Niche (both PSU and OIT are utilizing this)

### **Financial Aid**

- Financial Aid faced a series of hurdles as it prepared to award students their aid packages for 23-24.
  - Banner Financial Aid implementation has been ongoing, with a series of reports and interfaces not running correctly
  - There have been delays in scholarship awarding, with students still receiving scholarship awards into the first couple of weeks of school
  - Staffing continues to be a challenge. The Director has been unable to fill critical positions, resulting in delays in nearly every area of Financial Aid
- Goals for the 23-24 academic year include filling all vacant positions, addressing all Banner Financial Aid interface issues, and preparing for the FAFSA Simplification Act.

### New Student & Family Programs (NSFP)

- Fall orientation programs completed with great success!
  - The third Destination Western cohort has wrapped up successfully with 165 students having completed the program this year. A full demographic data report will be available by the week 4 census; however, the results of the pre and post survey comparison can be found in the [ASAC Supplemental Report - Fall 2023](#) (page 2)
- PACK Welcome Week also just wrapped, as the last step of the PACK Welcome onboarding program. PACK stands for Prepare, Advise, Connect, and Know, and runs from February to September for all Fall admits. For Welcome Week, over 10,000 engagements occurred - meaning overall attendance at workshops, social events, professor panels, and club activities held throughout the week. This equates to roughly 10 activities per new student.
- For reference, the 2022 Destination Western Cohort data can be found [here](#). Of significance is the **85% retention rate** for this cohort.

### University Housing

- University Housing opened the residence halls with 1000 students this fall, the highest number since Fall 2019. Currently there are 996 students living on campus, compared to 913 this time last year.
  - University Housing opened the residence halls early to welcome 123 preseason athletes, 186 Destination Western participants and staff, and other students arriving early to work on campus or begin their student teaching.
- During Summer 2023, 25 groups and just over 4,000 guests were welcomed to the residence halls for summer conferences and events. The summer conference program generated over \$326,500 in gross revenue for University Housing.

### Abby's House, Center for Equity & Gender Justice

- Abby's House was awarded a Department of Justice grant titled "Reduce Domestic Violence, Dating Violence, Sexual Assault, and Stalking on Campus" for \$396,755 over the course of three years
  - The focus will be on sexual violence prevention, with the biggest focus on the LGBTQ community. Abby's House will collaborate with Sable House, Monmouth PD, and Bradley Angle (a Domestic Violence agency focused on the LGBTQ community in Portland)
  - With this grant, Abby's House will hire a new Prevention Coordinator for the grant activities, and will also supervise and oversee the Stonewall Center
- Data from the basic needs survey administered to students last spring:
  - **50%** of the students who responded experience food insecurity
  - **48%** of the students experience housing insecurity
  - **68%** of the students experience any basic needs insecurity
  - The biggest barriers to using campus supports at WOU for basic needs insecurity are **awareness** of the supports, **scarcity concerns**, and **availability**

- A new confidential advocate was hired - Kailey Knospe
- Abby's House is in the last year of the VOCA grant that offers confidential advocacy to survivors of interpersonal violence
- Abby's House applied for a Swipe Out Hunger grant for the Food Pantry- award could be \$3,000-\$6,000

### **Campus Dining**

- **Conferences.** This summer marked a significant milestone for Campus Dining as we hosted groups of 400 to 500 people every week following graduations, a feat that truly showcases our commitment to excellence. We served an astonishing total of 19,107 individuals and provided 53,520 meals throughout the summer. These figures do not account for pre-season athletes and Destination Western. This significantly bolstered our dining budget, which in turn enables us to maintain cost affordability for students.
- Student staffing has been a challenge for Campus Dining. As of today, the second day of school, we still have 104 unassigned shifts and are still looking for approximately 40 employees to operate sufficiently. We are hopeful that we will be able to hire and fill these open positions in the next few weeks. The goal of having to open all food concepts will be a challenge due to the shortage of student staffing. Dining has come up with self-serve stations where students are able to serve themselves in order to overcome the staffing shortage.
- The Press Coffee shop is still to be announced regarding the opening, as we are still working to fill the open positions for Allegro.

### **Center for Professional Pathways (CPP)**

- **Student Employment** - Due to lagging student employment applications over the last few years, CPP conducted a massive student hiring effort this fall. All current students were surveyed on their interest in working, their skills and their preferences, then matched with employers on and off campus for interviews. Off campus employers all are contracted as WOU Work Study sites, as part of a program managed by CPP.
  - 480 students responded
  - 368 expressed interest in working part-time with school
  - 25 agencies on/off campus participated in the recruitment, 14 interviewed at 2 interviewing events, and conducted 162 interviews. The remaining, interviewed in their respective offices. Agencies hired between one and twelve students, each.
- **WOU Grow.** The Center for Professional Pathways guides campus employers and their student employees through a program called WOU Grow. WOU Grow is a self-guided reflection of the work student employees are involved in while at WOU. Managers assist students with applying what they learn in their jobs to how those experiences connect with what they are learning academically and in preparation for their careers. A survey was conducted at the end of spring term and the results can be found in the [ASAC Supplemental Report - Fall 2023](#) (Page 3).

- **Post Graduation Employment Outcomes.** The Center for Professional Pathways surveyed recent graduates relative to their employment outcomes. The data from 2023, along with comparative data for 2021 and 2018 can be found in the [ASAC Supplemental Report – Fall 2023](#) (Page 3)

### **Child Development Center (CDC)**

- Almost Full enrollment - 44 kids this year (still have openings in the part-time room)
- Opened a new part-time, 3 mornings a week, classroom
- Very successful Open House held on September 20th. 36 Families attended.
- 23-24 brings a lot of young students who were “Covid Babies/Toddlers” Facing a lot more challenges with social-emotional behaviors and less exposure to pre-k materials. Have had to add more Student Staff to help with extra coverage needed.
- Because of this, higher than usual referrals to WESD (Willamette Education Service District) for screening and assessment for services.
- Still have 2 part-time Teacher openings and no applications since posted in May.
- Current staff of 25 including Director, 3 full time teachers, 2 part-time teachers and 19 student teachers.

### **Office Disability Services (ODS)**

- Staff:
  - Grant Harris was hired as Accommodations Coordinator.
  - Four additional hourly interpreters were hired to help meet the ever growing demand for interpreting services.
- General Operation:
  - ODS had their first Open House event on September 25th which was a success. Several staff members, faculty members, and students showed up to visit ODS, meet the staff and learn about what ODS does. A second Open House will take place later in October.
  - Accommodation requests for the Fall 2023 term is already higher than that of Fall 2022 and Winter and Spring 2023. ODS is providing accommodations for 375 classes so far this term compared to 353 in Fall 2022.
- Training:
  - ODS completed awareness building training on how to work with students with disabilities with 5 academic departments on campus. Two more than last year.
- Graduation:
  - ODS, 47 students requested ODS honors graduation cords. 9 more compared to last year.



### **Multicultural Student Services and Programs (MSSP)**

- 55 new Diversity Scholars for 23-24 (41 First Year, 14 Transfer = 55)
- 63 new On Track participants for 23-24 (47 First Year, 16 Transfer = 63)
- MCR Mentor Program: 25 Mentors (volunteers) for the academic year who will be working with the 125 new incoming first year and transfer students.
- Retention Rate of 21-22 Cohorts:
  - Diversity Scholar First Year students = 75.76% Retention Rate
  - On Track First Year students = 81.25% Retention Rate

### **Student Conduct**

- Student Conduct started out the fall term strong, programming being one of their goals using the tagline, “We are more than Conduct, we are Community!” The Office of Student Conduct started Pack Welcome Week off with Speed Friending- which was an overwhelming success, over 50 students participated and learned about setting boundaries and how to have healthy friendships - before it becomes a conduct issue. They also held “Italian Sodas with Important Folks,” which spotlighted some of the folks on campus that work with crisis situations, receive reports from students and are important resources for our students. Over 75 students enjoyed an Italian soda made by important folks. The most successful program was in partnership with Student Engagement’s Game Night where they set up a “Who Done It, Murder Mystery.” Hundreds of students came through to solve the case.
- Student Conduct has worked to develop a new conduct card that will be handed out to students who are alleged to have violated a Code or Guide policy. The new card lists Student Rights Through the Conduct Process and has a QR Code that leads them to the Student Conduct website.

### **Student Engagement**

- Homecoming is full of campus traditions and fun events. Whether you are a department, organization, club, or student, this is the perfect week to show what it means to be a Wolf! It is October 16-21. Student schedule can be found [at the WOU Homecoming landing page.](#)
- Student Engagement and Student Activities Board hosted a “1st day of school photos” event (over 400 students participated over the two day event)
- Pack Welcome Week activities by Student Engagement, Student Media and Student Activities Board had over 1,100 student participants.
- Holiday Tree Lighting [December](#) 1st
- Student Media
  - The Western Howl is WOU’s weekly newspaper. This award-winning newspaper is written, edited and printed by students. Print issues are distributed on campus on Wednesdays while updates are added daily [online.](#)

- KWOU is WOU's student-run internet radio station. Featuring student DJs and engaging programs, interviews, and specials, KWOU is emerging as WOU students' favorite [radio station](#).
- The Northwest Passage is WOU's campus literary and arts publication, [published three times each academic year](#).
- Fraternity and Sorority Life
  - [Kappa Delta Chi](#)—Sorority on the WOU campus since 2012 with the Values: Honesty, Unity, Integrity, & Leadership
  - [Omega Delta Phi](#)—Fraternity on the WOU campus since 2103 with the Unity, Honesty, Integrity, & Leadership
  - [Alpha Chi Omega](#)—Sorority on the WOU campus since 2016 with the Values: Friendship, Leadership, Learning, & Service
- Student Organizations place events on Presence. To view events, click [here](#)

### **Student Health and Counseling Center (SHCC)**

- Staffing:
  - Down 3 counselors
  - Down 2 front office staff
  - Down 1 medical assistant
  - Down 1 medical provider/medical director
- The student patient portal page has been updated to include updated form and assessments, and many fillable forms to make the paperwork on students accessing SHCC more efficient and user friendly.
- Katie Kirkwood (counselor) is now fully licensed, meaning all of our professional counseling staff are Licensed Professional Counselors (Katie, Chelsea, Roxanne).
- 2023 so far:
  - Summer 23
    - Medical clinic - saw more students this summer than in 4 years (since 2019)
    - Counseling clinic - saw more students this summer than in the past 6 years (when I started keeping data in 2017) other than the summer of 2020, where the #s are similar to this summer.
  - Destination Western
    - Increase in contacts each year (crisis)
      - 2021 - 5 contacts
      - 2022 - 8 contacts
      - 2023 - 12 contacts
  - Fall 23 - counseling is a 2-3 week wait (still not bad compared to 6+ month wait in the community).
  - Consider the increase in numbers - and we are still down 3 counselors.
- Student Health and Counseling conducted a Student Satisfaction survey based on student experiences with SHCC over the 2022-23 academic year. The results of the survey can be found in the [ASAC Supplemental Report – Fall 2023](#) (Page 4)

### **Upward Bound (TRIO UB)**

- Tutoring and advising have started at both Dallas and Central High Schools.
  - Due to a schedule change at Dallas High School, UB tutoring at Dallas will take place in the morning during an applied learning intervention class period instead of after school. This comes with potential benefits as well as challenges. Benefits might include better attendance since it is part of their school day, and having Dallas faculty/staff readily available for participants to retake tests or talk directly to teachers during this time as well. Hiring WOU students as tutors/mentors during the morning when many students are in class will be a challenge. The new schedule will be assessed over the next few months.
- We have two full-day college prep workshops for UB seniors (12th graders), and one Saturday Academy for all participants scheduled in fall term.
- UB staff have been participating in webinars to learn more about the upcoming changes to the FAFSA to best serve our students.

### **Veterans Resource Center (VRC)**

- Staffing: 1 professional staff, 4 VA workstudy student staff, all returning students.
- 2023 so far: We have a large and persistent group of students utilizing the VRC so far this Fall term. We are seeing great diversity of students using the VRC both ethnically & military-affiliation wise. There is a positive energy and a constant buzz as new students engage with the Student Veterans of America club and their ongoing events!
- Upcoming events:
  - 07OCT2023 - Military Appreciation Football Game
  - Veterans Day Week has a multitude of events such as
    - Workshops, a Veterans breakfast, a VFW Veterans Uniform display, the ODVA Women Veterans Exhibit, Veterans Connections (CPP+VRC Alumni connections event), and our third annual Ruck N' Run 5k (VRC+Campus Recreation+WOU Rugby+ WOU Army ROTC)

### **Wolfstore**

- There has been an increase of excitement and energy in the Wolfstore as students returned to campus. Move-in days were lively and successful.
- A construction project was completed this summer to remove old built-in wall fixtures and repurpose them into mobile fixtures to create a more modern look and better flow in the layout of the Wolfstore.
- The gifts section has expanded to include items that are not imprinted with a WOU logo, but student focused, and has resulted in positive feedback and sales.
- The Wolfstore has seen an increase in sales over last year in all three of our top selling departments: Clothing, Textbooks, and Gifts.
- A new, more user-friendly, course materials adoption form was created and sent out to faculty. This new form is being used to collect information to display on the Wolfstore's [website](#) for students, as required by Oregon HB 2919, and will ease the process of reporting to the state.



## VPFA Report

### Major Accomplishments:

- 1) 1) we are under construction contracts for two major construction projects – Student Success Center and WOU Salem remodel
- 2) Tom Litterer was hired as new USC Director
- 3) Financial Statements and the audit of financial statements in the completion stage and will be presented at the next FAC and BOT meetings

### Challenges:

- 1) The Division continues to experience significant staffing challenges. The primary areas of concerns are night custodians, UCS, and Business and Accounting Services

### Opportunities:

- 1) Renovation of the Welcome Center to create consolidated business services for students. In addition to Admission and Financial Aid, the building will house Bursar Office, Accounting Services, and the Registrar Office.
- 2) Continuing work with UBAC and UTAC to engage a wide variety of stakeholders into various decision-making processes.

### Recognitions:

After more than 30 years of dedicated service to WOU, Darin Silbernagel will retire at the end of December. During his tenure at WOU Daring held various positions including VPFA, Director of Business Services, and most recently Treasurer.



**FROM:** Ricardo Lujan Valerio, Director of Government Relations

**TO:** Western Oregon University  
Board of Trustees

**RE:** November Board Update – Government Relations

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To the Board of Trustees:

This memo serves as an interim report in preparation of the 2024 legislative session. The following will cover implementation work for the TRU+ sustainability funds, a reflection of the September legislative days, the tentative initiatives that we have identified for advocacy, and noteworthy information and developments.

### **2024 Legislative Session Preparation**

Since the conclusion of the 2023 legislative session, the state has been preparing for a short session that sticks to the spirit of addressing missed opportunities that do not extend to new policy. Since the implementation of new state revenue forecast calculation methodology, the state has seen more stability on what they should expect for the general fund. [Total General Fund resources in 2023-2025 are increased \\$437 million compared to the Close of Session forecast.](#) While this will allow the legislature to explore additional funding opportunities in the session, the scope of projects will be limited.

During the September legislative days, President Peters spent a day at the Capitol meeting with legislative leadership, district delegation, and members of the education committees from both chambers. President Peters shared with legislative leadership some of the Western Oregon's early initiatives for the 2024 session. Given the nature of the short session, all seven public universities have leaned towards assisting the legislative agenda generated by students in addition to our institutional priorities. Western Oregon has identified the following items:

1. Open Educational Resource (OER) funding;
2. Hunger-Free Campus funding;
3. Destination Western continuing funding;
4. TRU+ Behavioral Health programming funding; and
5. Rice Auditorium ADA Retrofit (capital construction).

This list is not exhaustive and will be amended after pre-session filings have been released and in consultation with our campus partners.

## **TRU+ Sustainability Funds**

During the 2023 legislative session, the four TRU campuses and Portland State University (TRU+) received a conditioned allocation of \$25 million for financial sustainability initiatives. This funding structure is complex, multi-layered, and continually evolving. At this moment, the \$25 million has been split into two tranches. The first tranche, consisting of \$6.2 million, has been released by the HECC to the five institutions. Western Oregon's share of that allocation is \$1,022,000. Western Oregon's senior leadership team will be working with the University Budget Advisory Committee (UBAC) to best inform a process for communicating the early use of these funds.

The second tranche of funding, consisting of the remaining \$18 million, is retained by the state until the HECC and universities present a report to the legislature in 2024 with recommendations on best uses of the remaining funds. The HECC has convened a workgroup consisting of university administrative leadership, statewide union representation, and student advocacy to best inform the report process and the initiative that may be explored with the remaining funds. Given that these conversations are happening in real time, we are working closely with that group to best engage our campus community in best use of these funds for the potential share that Western Oregon may receive.

The UBAC will be a critical component to this initiative in ensuring that we are reaching out to the broad Western Oregon community while maneuvering the complexities of what these funds may and may not be able to provide. Our first report to the HECC is on December 15, 2023.

### **Additional Noteworthy Information**

- Western Oregon continues to work with the HECC, other public universities, and community colleges on the developments of the Oregon Opportunity Grant. After the total allocation of over \$300M from the legislature and the HECC's award formula shifting from Cost of Attendance to Cost of Tuition and Fees, university students saw a substantial increase in their OOG award. Community colleges want to explore reverting back to the Cost of Attendance methodology.
- Western Oregon is working to schedule a meeting with the Council for the Confederated Tribes of Grand Ronde in an effort to increase partnership. We are hoping to confirm a date during the month of November.
- Oregon House Speaker Rayfield has announced his candidacy for Oregon Attorney General. He intends to stay as Speaker for the short session.
- We are currently holding an exploratory initiative for international partnerships - most notably, President Peters will meet with Mexican Consul Carlos Quesnel on November 7, 2023.



## Department of Athletics Board of Trustees Report- November 2023

### 2022-23 Academic Highlights

- 39 student-athletes earned GNAC Faculty Athletic Representative Award (3.85+)
- 85 student-athletes earned GNAC Academic All-Conference Award
- 173 student-athletes named to the WOU honor roll list

### Retention and Graduation status

- 82% first to second year retention rate
- 80% Academic Success Rate
- 71 student athletes graduated in FY23
- Women's Team GPA- 3.44
- Men's Team GPA- 3.09

### FY24 student athlete information

442 Student-Athletes (161 female, 281 male)

- 32% First-Year, 24% Second Year, 19% Third Year, 21% Fourth Year, 4% Fifth Year
- 53% In-State (Oregon)
- 47% WUE/Out of state- (20% WA, 10% CA, 6% HI)

### Ethnicity (as reported on NCAA compliance survey)

- 53% White/Non-Hispanic
- 19% Two or More
- 11% Black
- 11% Hispanic
- 5% Native Hawaiian/Pacific Islander
- 1% Native American

### Events Hosted (Summer/Fall)

Sport Camps/Clinics (900 participants- June-September).

Wolves on the Green Golf Outing (fundraiser for women's athletic programs- August).

Wolves Football Hall of Fame (September).

Homecoming Athletics Reunion (October).

Wolves Athletic Hall of Fame (October).

Stumptown Youth Cross Country Championship (1500 participants- October).

NCAA West Region Cross Country Championship (November).

**Fall Sport Update**

Cross Country- Men finish 4<sup>th</sup>, Women 6<sup>th</sup> at GNAC Championship, Men 17<sup>th</sup> and women 18<sup>th</sup> at NCAA West Region Championship

Football- 3-7 record with one game remaining in the season (LSC).

Men's Soccer- Currently in 2<sup>nd</sup> place in GNAC (10-3-3) overall record.

Women's Soccer- Ranked third in the GNAC and qualified for GNAC tournament.

Volleyball- 9-13 record with two weeks remaining in the season (GNAC).



# Campus Recreation – Fall 2023 Positives

## Health and Wellness Center

- Overall usage this Fall 2023 term has increased by 12.1% from Fall 2022. Additionally, there has been 35.7% unique student usage up to November 1, 2023.
- Retained 81.54% of our staff from the Spring term to the Fall Term (meaning just over 80% of our students returned to work with us after the summer)
- This fall term there are 38 community memberships with our facility, compared to last year's 25 members - a result of the increase of access for our community.
- Since August 2nd we have seen an increase of 10.8% in our Instagram followers on our main page, and our highest-performing post reached 1,229 accounts and received 287 likes.
- Hired 14 new student employees this Fall term (front desk, lifeguard, fitness)
- In October 2023, we have seen 13 new faculty/staff join the HWC membership.

## Aquatics

- Prior investments into technical processes starting to pay off as the condition and functionality of the pool are in a much better condition than 2 years ago.
- Well-established, swimming lessons continue to provide much-needed revenue and continue to support student teaching observation hours and community relations.
- We are positioned to offer Instructor level courses in several areas of the American Red Cross program again providing revenue when needed and providing local and statewide help to fill gaps in this industry.
- These revenue-generating programs are funding the student labor hours for Open/Lap swim times formerly funded by Incidental Fee funding.

## Club Sports

- Club Sport participation for the current year is already at the 2nd highest level ever, and we are on pace to surpass the all-time participation record.
- Intramural Sports
- Drop-In Intramural Sports remains an extremely popular program and the 54 participants on Sept. 28th was the highest we have seen for any single Intramural event since before the pandemic.

## Climbing

- Our partnership with George Fox over the past years has paid off saving on training costs and increasing the frequency of Professional Certification courses.
- New setting practices are putting us in a position to review past practices and model setting risk management and standardize policies with other Oregon Universities as well as commercial gyms.
- Our youth programs are becoming better established to produce positive community support while allowing WOU student teaching experiences.

## Outdoor

- Last year's investment in training has paid off this year with 9 trained outdoor trip leaders. This supports quality, safe, fun outdoor experiences and keeps us in standard practice.
- The Outdoor Pursuits Club is up and running with a new club foundation fund. This will allow the club more capability for outings and fundraising for their 6 scheduled trips and recruitment events this year.

## Fitness

- The addition of the Les Mills in-house certifications has been a smooth transition, allowing us the ability to offer multiple new branded classes which are still a part of the membership cost.

# Campus Recreation – Fall 2023 Challenges

## Club Sports

- Field space for Club Sports and Athletics teams continues to be a significant problem at WOU. It has been a problem for years, but the addition of the Men's Soccer program has exasperated things. The Men's Soccer program is unwilling or unable to use the grass soccer field and this has caused major scheduling challenges on the turf field. Students on Club Sports teams have been the groups that have borne the brunt of this problem as they have had to move or cancel matches and practices when Soccer matches have been scheduled over the traditional Club Sports usage times. Frustrations amongst these student groups have risen significantly these last few months. It is becoming increasingly difficult to mediate those frustrations and maintain positive relationships between these student groups.
- An Athletic Trainer shortage in the area continues to pose problems for our Club Sports teams. OSU and UO are also facing this challenge. There is no end in sight to this shortage. OSU had to forfeit a Rugby match recently and we have been perilously close to having to do the same on multiple occasions.

## Aquatics

- The lack of funding puts massive amounts of pressure on the aquatics program and our ability to create revenue. We will be doing several closures over the year to offset costs and create backups to current systems.
- Antiquated systems have been fixed or replaced over the past 5 years at a cost to Campus Recreation. These systems/assets do not seem to have depreciation attached costing us much more now.

## Health and Wellness Center

- The overall budget is being used quickly due to the estimated percentage utilities cost versus actual usage cost, repairs of the General Fund Aquatic Center, and custodial cost not separated for Turf Field usage.
- We still do not have credit card processing available at our front desk or via eCommerce.
- Still ongoing issues with RecTrac as we continue to integrate it as our processing system.

## Climbing

- Lack of funding is limiting our ability to reinvest in staff leadership opportunities and is putting us in a position to push much-needed professional training back. If we did not have our relationship with Goerge Fox these certification courses could be out of reach.
- Lack of funding pushes essential equipment to its rated limits. As we reinvest in programs, we are having to spend more time reinspecting gear and retiring items. Typically, we can mitigate this with on-hand replacements. These supplies are running low and will need to be replaced as we approach the lifespan of the equipment.

## Outdoor

- The overall lack of funding has pushed this program to its creative limits. This program should be a highlighted sustainable program as is at our competing universities as we meet all the criteria.
- Budget limitations will continue to force rental prices on outdoor equipment to increase. We need more robust equipment to offer more competitive outings.
- We have a lot of highly motivated leaders as well as student participants who are limited on opportunities due to the lack of investment in trips.
- We have eliminated the Spring 2024 Outdoor trip due to late Spring 2023 Van Charges being delayed until September 2023.

## Fitness

- Lack of participation in several classes will drive us to reduce class offerings next term by 50%, while lack of funding limits our ability to host events that could drive participation.

**Western Oregon University Board of Trustees – November 2023**

**Desiree Noah, Executive Director of Human Resources**

The Office of Human Resources is dedicated to Western Oregon University’s commitment to student success by support of the core principles of teaching and learning; a healthy campus community and environment; academic freedom and diversity; and, fiscal health, accountability and continuous improvement. The office will provide the human resources services to support the recruitment, retention and development of faculty and staff by working with others in the campus community to improve services and how those services are offered.

Below are highlights of the achievements and ongoing initiatives of the Human Resources team:

- **Enhanced New Employee Orientation (NEO):** The NEO program was reinstated in November 2022 after a COVID-induced pause, and it has seen significant growth and improvements. From November 2022 to June 2023, 25 participants joined the program. Since July 2023, this number has increased to 43. We have dedicated ourselves to enhancing and expanding the program, making it more welcoming and informative for new members. We actively seek and respond to feedback from participants, making necessary changes and updates to the program.
- **PeopleAdmin Implementation:** HR has been working diligently for over a year on the implementation of People Admin Applicant Tracking System. This new system will streamline the hiring and recruitment processes and enhance the visibility and efficiencies for all stakeholders throughout the hiring and recruitment journey. We’re wrapping up testing and looking forward to setting a Go Live date and campus wide trainings in the near future.
- **Campus Engagement:** The HR team is fostering strong connections with various departments across campus through open and constructive dialogues. These efforts aim to nurture relationships, proactively address any challenges they might encounter, and systematically collect valuable data to enhance future supervisory training programs.

Phase I (Feb-June 2023)	The Research Institute, Dining, Custodial (Night) and DEI
Phase II (July-August 2023)	Athletics, Housing, VPSA, Financial Aid, WolfStore, UCS, Facilities Services, Admissions, Abby’s House, Center for Professional Pathways
Phase III (Aug-Oct 2023)	LAS, COE, Provost, Library, Graduate & Research, Academic Effectiveness

- **Successful Open Enrollment:** We are delighted to report the success of our open enrollment efforts. HR organized multiple information sessions and hosted a Benefits Fair that included a COVID-19 and flu shot

clinic. As of October 31, our open enrollment completion rate stood at an impressive 97%, ensuring that our employees have the coverage they need.

- **Position Change:** Julie McMurry has transitioned from her role as FT Interim Senior Assistant Director to become a PT HRIS Analyst. In this capacity, she has been dedicated to the implementation of Electronic Personnel Action Forms (EPAFs) to streamline employee records. Additionally, she will provide vital support to our Recruitment Coordinator in implementing PeopleAdmin. She will also be implementing WebTime Entry for all employees, driving further efficiency in our HR processes.
- **Promotion:** Kaitlin Villarreal was promoted to Office Manager, effective July 1. After an internal search, we are proud to announce that Jamie Smith has been selected to take on the role of Associate Director, effective November 1. Jamie's experience and dedication to our institution and HR team make her the ideal candidate to lead in this new capacity.

In the coming year, the Human Resources team will be dedicated to the following three goals:

1. **Elevating the Employee Experience:** We are committed to strengthening and enhancing the employee experience by actively listening to and supporting your needs. We will deliver high-quality services and exhibit knowledgeable, responsive, and timely communication, along with accountable interactions and behaviors.
2. **Fostering HR Excellence and Nurturing Innovation:** Our aim is to achieve successful outcomes by leveraging HR technology, streamlining processes, and delivering evidence-based, measurable, quality services, all while focusing on continuous improvement.
3. **Cultivating Employee Development:** Our commitment to continued learning will be evident through talent and organizational development strategies designed to motivate, engage, and educate a high-performing workforce.

### Key Data Points:

#### a) Recruitments:

July 1, 2023 - present	Total including Internal	Unclassified # days	Classified # of days	Faculty # of days
The total number of positions posted since July 2023	37	19	15	3
Total Average # of Business Days for "Completed" Searches (not including internal finalists) from "Open" to "Close"	34.04 days	36.25	31.83	no data available yet

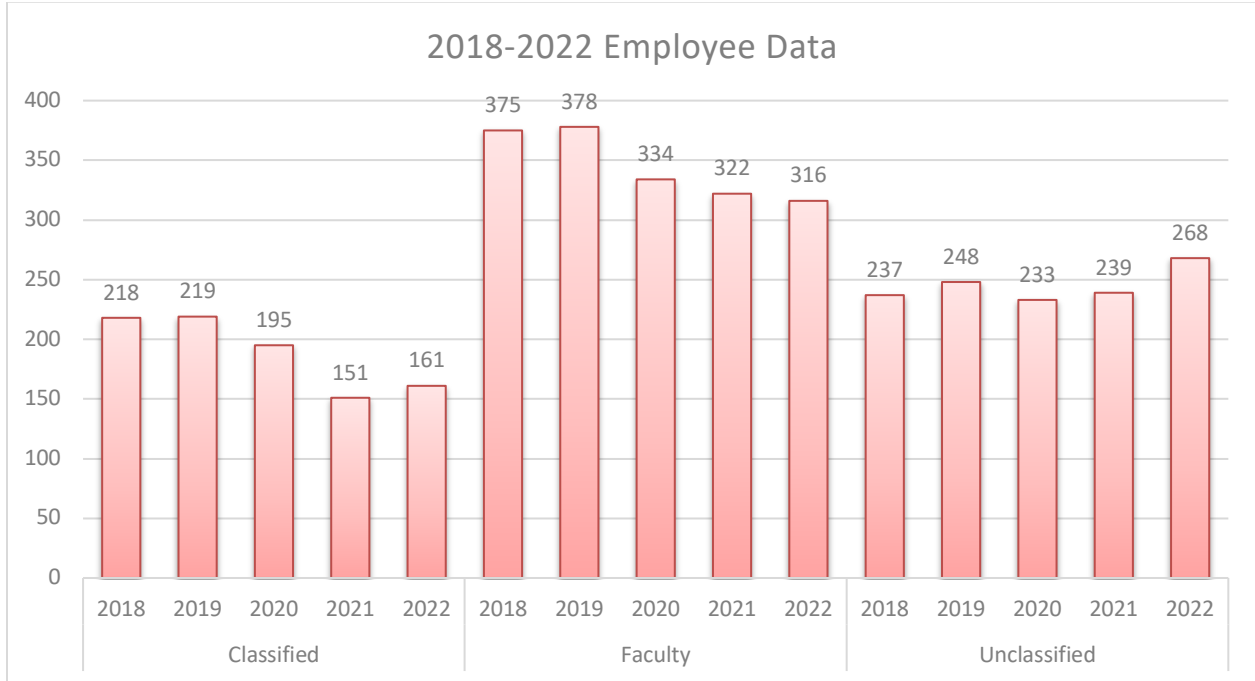
## b) Resignations/Terminations:

July 1, 2023 - present	Total	Resignations	Retirements	Terminations
The total number of resignations/retirements/terminations	30	25	4	1

## c) Total Employees:

Type	Total Paid in October 2023
<i>Full-Time Classified</i>	148
<i>Part-Time Classified</i>	6
<b>Total Classified</b>	<b>154</b>
<i>Full-Time Faculty</i>	232
<i>Part-Time Faculty</i>	75
<b>Total Faculty</b>	<b>307</b>
<i>Full-Time Unclassified</i>	267
<i>Part-Time Unclassified</i>	1
<b>Total Unclassified</b>	<b>268</b>
<b>Total Employees</b>	<b>729</b>

d). Previous Data:



\*Numbers as of December YTD



## Diversity, Equity and Inclusion Report – November 3, 2023

Dominique Vargas, Executive Director of Diversity, Equity and Inclusion

### The Office

The office of Diversity, Equity and Inclusion moved to Lieuallen Administration Building 302. This allows easier collaboration with Human Resources and General Counsel.

Simone Stewart joined the office as the Executive Assistant/Coordinator in August. The office is recruiting to hire two positions a Title IX Coordinator and a position to focus on Hispanic Serving Institution Initiatives.

### Equity Assessment

Western Oregon University continues to engaged with Jordan Shelby West, PhD in our university-wide equity assessment.

Since the last Board of Trustees meeting in June 2023, Phase II and Phase III have been completed, all [Equity Assessment Materials](#) are available to individuals with WOU usernames/log-ins.

In October 2023 a draft Equity Assessment Action Plan was provided to the Board Diversity, Equity and Inclusion Advisory Committee and the President's Cabinet for review and recommendations for moving forward. This plan was developed by the Equity Assessment Team, led by Dominique Vargas, included volunteers from the 2022-2023 University Diversity and Inclusion Advisory Committee, joined by two students recommended by Senior Leadership.

- Jaclyn Caires-Hurley, Associate Professor, College of Education
- Doris Cancel-Tirado, Professor, Health & Exercise Science
- Nicole Derrick, Junior, Community Health
- Gabriela Eyster, Construction Project Manager, Capital Planning & Construction
- Maria Fernandez, Director, Equity, Outreach & Inclusion, The Research Institute
- Maddux Gillett, Sophomore, Political Science
- Sarah Lockwood, Facilities Scheduling Manager, Student Engagement
- Chung-Fan Ni, Associate Professor, Deaf Studies & Professional Studies
- Mari Sakiyama, Assistant Professor, Criminal Justice Sciences
- Chris Solario, Director, Student Enrichment Program
- Judy Sylva, Associate Provost for Academic Effectiveness, Academic Affairs

The plan will be updated from draft form to final form once initiatives are approved and ownership for each approved initiative is established. The draft and corresponding materials are offered as an appendix to this report.

### Cultural Competence Based Professional Development

In alignment with the Equity Assessment Action Plan and Western's responsibility to comply with [Oregon House Bill 2864](#), the office of Diversity, Equity and Inclusion in collaboration with the University Diversity and Inclusion Advisory Committee Cultural Competence Subcommittee will host professional

development for the university based within the overarching theme of accessibility. The first opportunity was hosted as part of Fall Kick Off Week on September 20, 2023; 274 individuals participated.

Opportunities that can be made available asynchronously, following the synchronous opportunity, are available as part of the new DEI Canvas Course. Individuals can self-enroll in the course by completing [this form](#).

### **Hispanic Serving Institution (HSI) Designation**

24% of Western's undergraduate students identify as Hispanic/Latino/a/e. To become a Hispanic Serving Institution 25% of Western's undergraduate students must identify as Hispanic/Latino/a/e and we must maintain that minimum percentage for at least three years. Once we reach this goal, then we must continue to meet the minimum percentage to maintain the designation. As Western prioritizes efforts to become a Hispanic Serving Institution the focus is on becoming a serving institution in which our students feel they can be themselves and can thrive in our community.

The Hispanic Serving Institution Advisory Committee has begun meeting this Fall 2023 term with initial focus areas including: updating membership, data, and setting goals for the year. The HSI Advisory Committee currently includes: Doris Cancel-Tirado, Julian Elizalde, Kathy Espino-Perez, Hillary Fouts, Anna Hernandez-Hunter, Rico Lujan Valerio, Mary Pettenger, David Szpakowski, and Dominique Vargas. The committee is recruiting two students for the 2023-2024 year.

An updated Hispanic Serving Institution Summit Working Group has been formed and includes: Jamiere Abney, Chelle Batchelor, Doris Cancel-Tirado, Brittany Kima, Sarah Lockwood, and Dominique Vargas. The next HSI Summit is scheduled for Friday, April 26, 2024. This group will begin meeting in November to plan the spring summit.

President Jesse Peters, Doris Cancel-Tirado and Dominique Vargas attended the Hispanic Association of Colleges and Universities Annual Conference in Chicago, October 27-October 31. Additionally, [Cancel-Tirado and Vargas were selected for leadership fellowships with HACU for the 2023-2024 cohort](#), which started prior to the conference in Chicago.

### **Title IX**

In Summer 2023, [Oregon House Bill 3456](#) was passed. Western is developing a new asynchronous training for all students and employees to engage with in Canvas to help meet compliance with this new bill. This training will be made available by the end of November 2023, and will need to be completed by the end of Spring 2024.

In collaboration with university partners, the Office of Diversity, Equity and Inclusion updated Western's Title IX policy to better align with 2020 legislation. The [Sex and Gender-Based Misconduct Policy](#) is online and went into effect on September 18, 2023.

Additionally, we streamlined the reporting process by creating one form for both Title IX and bias related reporting. The [Sex or Gender-Based Misconduct and Bias Reporting Form](#) is online and went into effect at the start of the fall term.



In collaboration with university partners, the Office of Diversity, Equity and Inclusion is currently updating Title IX procedures.

New Title IX regulations are expected from the federal government sometime this academic year. When these regulations are available, there will likely be additional revision for relevant policies and procedures.

### **LGBTQ2SIA+ Student Success Grant**

Western was awarded an extension/amendment for the LGBTQ2SIA+ Student Success Grant. The LGBTQ2SIA+ Student Success grant is based in the Oregon's [LGBTQ2SIA+ Student Success Plan](#). Western alum, Melody Barrett has been hired part-time to coordinate the grant project, which is a partnership with Central School District.

### **Freedom Center**

The Freedom Center is open for the 2023-2024 academic year with co-directors Ana-Malia Fernandez and Aneli Godinez-Martinez. The Freedom Center is currently recruiting two additional student staff. This fall, the Freedom Center has provided a variety of resources to students and co-facilitated Latinx Jeopardy with the Unidos student organization for Hispanic/Latinx Heritage Month. They are also planning an event to celebrate Native American Heritage Month.

### **University Diversity and Inclusion Advisory Committee**

The University Diversity and Inclusion Advisory Committee has not yet met at the time of this report.

## Equity Assessment Action Plan Summary

Western Oregon University (WOU) began engaging in an equity assessment in November 2022. In May 2023, WOU received the Equity Assessment Phase I Report from Jordan Shelby West, PhD. In May 2023, Dominique Vargas, Executive Director of Diversity, Equity and Inclusion, established an Equity Assessment Team to turn assessment recommendations into initiatives for an action plan to start during the 2023-2024 academic year. The Phase II Report was received in August 2023, and the Phase III Report was received in October 2023. This Equity Assessment Team met through September 2023 and established the attached plan.

### **Equity Assessment Team**

The Equity Assessment Team, led by Vargas, included volunteers from the 2022-2023 University Diversity and Inclusion Advisory Committee, joined by two students recommended by Senior Leadership.

- Jaclyn Caires-Hurley, Associate Professor, College of Education
- Doris Cancel-Tirado, Professor, Health & Exercise Science
- Nicole Derrick, Junior, Community Health
- Gabriela Eyster, Construction Project Manager, Capital Planning & Construction
- Maria Fernandez, Director, Equity, Outreach & Inclusion, The Research Institute
- Maddux Gillett, Sophomore, Political Science
- Sarah Lockwood, Facilities Scheduling Manager, Student Engagement
- Chung-Fan Ni, Associate Professor, Deaf Studies & Professional Studies
- Mari Sakiyama, Assistant Professor, Criminal Justice Sciences
- Chris Solario, Director, Student Enrichment Program
- Judy Sylva, Associate Provost for Academic Effectiveness, Academic Affairs

### **The Process**

The team reviewed all relevant equity assessment materials. The recommendations from the report were first categorized by the equity assessment phase I themes: Diversity and Inclusion, Communication and Technology, Accountability, Physical Environment and Safety, Community, Leadership. The newly categorized recommendations were matched with the three emerging values from the current WOU strategic planning process: Diversity and Respect, Community, and Accessibility. The recommendations were then further categorized within the seven goals of the WOU Diversity Action Plan, which include: Climate, Recruitment and Retention of Employees, Recruitment and Retention of Students, Curriculum and Pedagogy, Community Partnerships, Business Practices, and Facilities and Physical Plant. This alignment helped narrow the field of recommendations. The team then made considerations for four areas of impact: student impact, employee impact, financial resources, and people resources.

This process led to a focus on four key themes: accessibility, technology, recruitment and retention of students, and recruitment and retention of employees. Within each theme, there are short-, mid-, and long-term initiatives. Short-term is defined as something that could be

reasonable to complete or have ready by Fall 2024. Mid-term is defined as taking at least two, possibly three years. Then long-term is either an overarching goal, such as setting a university priority, or an initiative that would likely take three or more years to come to fruition.

## **The Review**

In October 2023, the equity assessment action plan draft was shared with the Board of Trustees Diversity, Equity and Inclusion Advisory Committee for review. The draft plan was also shared with the President's Cabinet.

The expectation was both the DEIAC and Cabinet would provide feedback, ask questions, and make suggestions for prioritizing initiatives in the action plan. The action plan was then reviewed by President Peters for recommendations, for an updated plan draft by the November Board of Trustees meeting.

## **The Initiatives**

A list of the initiatives within each theme are listed below and fully outlined in the attached equity assessment action plan draft.

### Accessibility

#### *Short-Term*

- Establish accessibility as the 2023-2024 cultural competence focus for the university
- Establish an open-ended contract for Spanish interpreting services
- Promote communication with and utilization of the Office of Disability Services for students
- Require microphone usage at all major university meetings and programs; have programs and video communication set up for closed captioning and ASL interpretation

#### *Mid-Term*

- Equip all university event spaces with equipment for microphone usage and hybrid modality (could include portable equipment in centralized locations for checkout)
- Review and update policy and communication for all-person restrooms

#### *Long-Term*

- Accessibility is a funding priority for WOU

### Technology

#### *Short-Term*

- Include the Director of University Computing Solutions on the President's Cabinet
- Assess utilization of the library's equipment borrowing system

#### *Mid-Term*

- Set up guidelines for website architecture
- Implement the institutional policy on names
- Ensure all university forms are electronic
- Establish credit/debit card access for all university services

### *Long-Term*

- Technology infrastructure is brought to industry standards and best practices

## Recruitment and Retention of Students

### *Short-Term*

- Provide more opportunities for students to engage with senior leadership
- WOU will join the group of 1000+ colleges/universities using the Common Application
- Establish student resource modules (e.g., student orientation, online course tutorial, registration) for students on Canvas
- Create a virtual option for student orientation for remote/online students, commuter students, and transfer students

### *Mid-Term*

- Review, evaluate, and revise advising systems and structures
- Review and revise the Code of Student Responsibility and disciplinary procedures to shift to a restorative justice framework

### *Long-Term*

- Evaluate the MyWOU app and recommend the best path forward for an app that support students throughout their time at WOU, including Admissions through Graduation

## Recruitment and Retention of Employees

### *Short-Term*

- Reimagine onboarding as a six-month to one year process
- Evaluate new employee orientation and restructure as needed
- Streamline search committee process
- Improve professional development opportunities for all employees
- Clarify and/or establish a plan for more successful performance evaluation completion

### *Mid-Term*

- Evaluate and update performance management tools that include training, workshops, and resources
- Develop and implement supervisor specific professional development program for supervisors, which is then followed up with a consistently available learning community
- Transition the Center for Academic Innovation to the Center of Teaching and Learning, expand the existing initiatives and resources
- Develop/Redevelop and pilot mentorship programs (with consistency in mind, with specific and measurable outcomes)

### *Long-Term*

- Engage in a Classification and Compensation Project
- Conduct assessment of promotion and tenure process with an equity lens
- Development and promotion of junior faculty retention programs

## **Next Steps**

The Equity Assessment Action Plan Summary and Action Plan will be shared with the Board of Trustees for the November 2023 meeting. The Board will be provided time to engage with the material and provide feedback. Meanwhile, work will continue on plan initiatives and to establish firmer funding requests that are anticipated. The University Diversity and Inclusion Committee will review feedback and continue to further develop initiatives, assess impact, and recommend next steps. Following the receipt of feedback and the plan being updated, it will then be shared ahead of the February 2024 Board of Trustees meeting.

**Equity Assessment Action Plan**

Establishing long-, mid-, and short-term action items working toward WOU’s Diversity Action Plan goals

\*Table rows filled in light yellow are in process

\*Table rows filled in light green are complete

<b>Accessibility</b>				
<ul style="list-style-type: none"> <li>● Applicable Diversity Action Plan Goals: Climate, Recruitment &amp; Retention of Employees, Recruitment &amp; Retention of Students, Facilities &amp; Physical Plant</li> <li>● Applicable Equity Assessment Phase Themes: Diversity &amp; Inclusion, Communication &amp; Technology, Accountability, Physical Environment &amp; Safety, Community, Leadership</li> <li>● Applicable Strategic Plan Values: Diversity &amp; Respect, Community, Accessibility</li> </ul>				
Initiative	Timeline/Due Date	Responsible	Is Funding Needed	Outcomes/Deliverables
Short-Term				
Establish accessibility as the 2023-2024 cultural competence focus for the university	2023-2024	Diversity, Equity and Inclusion office, University Diversity and Inclusion Advisory Committee, University partners	Yes, DEI office partners with university departments/divisions to cover expenses associated with this initiative	2023-2024 <ul style="list-style-type: none"> <li>● At least one University professional development opportunity each term (fall, winter, spring) based on accessibility</li> <li>● Attendance tracked at each session - end of the year report including participation breakdown (e.g., classified, unclassified, faculty, etc.)</li> <li>● Feedback survey following each session - end of the year report</li> </ul>

				of attendees' self-assessments
Establish an open-ended contract for Spanish interpreting services	2023-2024	Diversity Equity and Inclusion Office, Marketing and Communication, Human Resources, Student Affairs, Academic Affairs	If services utilized, Senior Leadership will need to determine whose responsibility the cost should be	<p>2023-2024</p> <ul style="list-style-type: none"> <li>● Contract between Student Engagement and Professional Interpreters expanded to include all university departments</li> <li>● Implementation plan developed</li> <li>● Communicate service availability to the university community</li> </ul>
<p>Promote communication with and utilization of the Office of Disability Services for students</p> <ul style="list-style-type: none"> <li>● Office of Disability Services presentations to the WOU community</li> <li>● Update <a href="#">Western Oregon Web Accessibility Guidelines</a></li> </ul>	2023-2024	Office of Disability Services, Academic Innovation, University Computing Solutions, Diversity, Equity and Inclusion Office, Student Affairs, Academic Affairs, Marketing and Communication	No	<p>2023-2024</p> <ul style="list-style-type: none"> <li>● Western Oregon Web Accessibility Guidelines updated</li> <li>● Creating Accessible Content in Canvas updated</li> <li>● Best Practices list/guide developed</li> <li>● Distribution of materials through university communication</li> <li>● Accessibility workshop(s) facilitated to educate regarding resources and best practices</li> </ul>

<ul style="list-style-type: none"> <li>• Update <a href="#">Creating Accessible Content in Canvas</a></li> <li>• Develop list/guide of best practices and considerations for planning more accessible programs and events</li> </ul>				
<p>Require microphone usage at all major university meetings and programs; have programs and video communication set up for closed captioning and ASL interpretation</p>	<p>2023-2024</p>	<p>Marketing and Communication, WOU Reservations, University Computing Solutions, Human Resources</p>	<p>Human Resources or the Office of Disability Services traditionally covers cost of closed captioning and ASL interpreters, if use exceeds budget could lead to a funding request</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>• Establish expectation</li> <li>• Communicate expectation and how to fulfill expectation to the university community</li> </ul>
<p>Mid-Term</p>				
<p>Equip all university event spaces with equipment for microphone usage</p>	<p>2023-2025</p>	<p>University Computing Solutions, Facilities</p>	<p>Additional funding request anticipated</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>• Assessment of need 2024-2025</li> </ul>



and hybrid modality (could include portable equipment in centralized locations for checkout)				<ul style="list-style-type: none"> <li>Supplies ordered and installed</li> </ul> <p>Fall 2025</p> <ul style="list-style-type: none"> <li>Spaces ready for utilization</li> </ul>
<p>Review and update policy and communication for all-person restrooms</p> <ul style="list-style-type: none"> <li>Include the establishment of a standardized protocol for university restroom and locker room/ changing room usage.</li> </ul>	2023-2025	Diversity, Equity and Inclusion, Board of Trustees Secretary, Human Resources	No	<p>2023-2024</p> <ul style="list-style-type: none"> <li>Committee formed for review</li> <li>Policy updated</li> </ul> <p>2024-2025</p> <ul style="list-style-type: none"> <li>Policy implemented</li> </ul>
Long-term				
Accessibility is a funding priority for WOU	Ongoing	Facility Services, Capitol Planning and Construction, Office of Disability Services, University Computing Solutions. Consider joint initiative between University	No funding required for first step in this priority, however, long-term will need to make budgetary considerations to increase accessibility, to be determined and assessed annually.	<p>2023-2024</p> <ul style="list-style-type: none"> <li>Develop physical and digital accessibility policies                             <ul style="list-style-type: none"> <li>Committee(s) formed to develop policies</li> </ul> </li> </ul>

		Technology Advisory Committee and University Diversity and Inclusion Advisory Committee.		<ul style="list-style-type: none"><li>○ Drafted and reviewed</li><li>○ Public Comment</li><li>○ Approval</li><li>○ Implementation plan</li></ul> <p>Fall 2024</p> <ul style="list-style-type: none"><li>● Physical and digital accessibility policies rolled out</li></ul> <p>2024-2025</p> <ul style="list-style-type: none"><li>● Committee established to review the 2014 accessibility audit</li><li>● Review audit</li><li>● Determine next steps to begin to improve university accessibility, with initial recommendations to Cabinet by the end of Spring 2025</li></ul>
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<b>Technology</b>				
<ul style="list-style-type: none"> <li>• Applicable Diversity Action Plan Goals: Climate, Recruitment &amp; Retention of Employees, Recruitment &amp; Retention of Students, Curriculum &amp; Pedagogy, Business Practices, Facilities &amp; Physical Plant</li> <li>• Applicable Equity Assessment Phase Themes: Diversity &amp; Inclusion, Communication &amp; Technology, Accountability, Physical Environment &amp; Safety, Community, Leadership</li> <li>• Applicable Strategic Plan Values: Diversity &amp; Respect, Community, Accessibility</li> </ul>				
Initiative	Timeline/Due Date	Responsible	Is Funding Needed	Outcomes/Deliverables
<b>Short-Term</b>				
Include the Director of University Computing Solutions on the President’s Cabinet	2023-2024	President	No	Fall 2023 <ul style="list-style-type: none"> <li>• Director of University Computing Solutions on the President’s Cabinet</li> </ul>
Assess utilization of the library’s equipment borrowing system <ul style="list-style-type: none"> <li>• Increase advertisement for the equipment borrowing system regarding laptops and technology</li> <li>• Analyze usage and needs</li> </ul>	2023-2024	Academic Affairs, Library, University Computing Solutions, Student Affairs, University Technology Advisory Committee	No	2023-2024 <ul style="list-style-type: none"> <li>• Report of usage and assessment of need</li> <li>• Update communication regarding borrowing system</li> </ul> Fall 2024 <ul style="list-style-type: none"> <li>• Recommendations regarding increased needs or modifications</li> </ul>
<b>Mid-Term</b>				

<p>Set up guidelines for website architecture</p> <ul style="list-style-type: none"> <li>● Review and clean up the university website</li> <li>● Improve accessibility of website</li> <li>● Improve the responsiveness of website for mobile devices (e.g., phones and iPads)</li> <li>● Review usage of Spanish on website pages and make sure critical information (recruitment, admissions, financial aid, etc.) available in both English and Spanish</li> </ul>	<p>2023-2024</p>	<p>University Computing Solutions, Marketing and Communication, individuals in university community who have website editing permissions</p>	<p>No</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>● Review and update of the university website begins</li> <li>● Establish guidelines for the university community regarding web accessibility, responsiveness, and language</li> </ul> <p>Fall 2024</p> <ul style="list-style-type: none"> <li>● Guidelines established and shared with the university community to assist website editors in their updates</li> <li>● Additional training for website editors available</li> </ul>
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<p>Implement the institutional policy on names</p>	<p>2023-2025</p>	<p>Registrar, University Computing Solutions, Business Services, Financial Aid, Admissions, Human Resources</p>	<p>Not anticipated at this time</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>Implementation plan drafted</li> </ul> <p>2024-2025</p> <ul style="list-style-type: none"> <li>Implementation plan begins</li> </ul> <p>Fall 2025</p> <ul style="list-style-type: none"> <li>Fully implemented</li> </ul>
<p>Ensure all university forms are electronic</p>	<p>2023-2025</p>	<p>University Computing Solutions, Marketing and Communication, All University Offices/Departments/Units/Etc.</p>	<p>No</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>Develop implementation plan for converting forms to electronic versions</li> </ul> <p>2024-2025</p> <ul style="list-style-type: none"> <li>Plan implemented</li> </ul> <p>Fall 2025</p> <ul style="list-style-type: none"> <li>All university forms are electronically available for intended users</li> </ul>
<p>Establish credit/debit card access for all university services</p>	<p>2023-2025</p>	<p>Vice President for Finance and Administration, University Computing Solutions, Business Services</p>	<p>Additional funding request anticipated</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>Research needs and requirements for all university services to be available to be paid for by credit card</li> </ul> <p>2024-2025</p> <ul style="list-style-type: none"> <li>Develop plan for credit card access</li> </ul> <p>Fall 2025</p> <ul style="list-style-type: none"> <li>All university services are able to be</li> </ul>

				purchased utilizing a credit card
Long-term				
Technology Infrastructure is brought to industry standards and best practices	Ongoing		Additional funding request anticipated as work through needs assessment to bring university to industry standards and best practices.	

Recruitment & Retention of Students				
<ul style="list-style-type: none"> <li>• Applicable Diversity Action Plan Goals: Climate, Recruitment &amp; Retention of Employees, Recruitment &amp; Retention of Students, Curriculum &amp; Pedagogy</li> <li>• Applicable Equity Assessment Phase Themes: Diversity &amp; Inclusion, Communication &amp; Technology, Accountability, Physical Environment &amp; Safety, Community, Leadership</li> <li>• Applicable Strategic Plan Values: Diversity &amp; Respect, Community, Accessibility</li> </ul>				
Initiative	Timeline/Due Date	Responsible	Is Funding Needed	Outcomes/Deliverables
Short-Term				
Provide more opportunities for students to engage with senior leadership	2023-2024	Senior Leadership	President’s office to support light refreshments	2023-2024 <ul style="list-style-type: none"> <li>• Host one informal fireside chat per term</li> </ul>
<p>WOU will join the group of 1000+ colleges/ universities using the Common Application</p> <p><i>"Common App is a non-profit membership organization representing more than 1,000 diverse institutions of higher education. We connect applicants and</i></p>	2023-2024	Admissions, Student Affairs, University Computing Solutions	<p>\$5,000 - \$10,000 (initial joining fee), \$2,500 (annual fee) – initial \$10,000 paid through sustainability funds</p> <p>Details on funding: Implementation fee – one-time cost based on platform (3 levels)</p> <ul style="list-style-type: none"> <li>• Essential Platform (\$5,000)</li> <li>• Standard Platform (\$7,000)</li> <li>• Custom Platform (\$10,000)</li> </ul>	<p>December 2023</p> <ul style="list-style-type: none"> <li>• Signed letter of intent Spring 2024</li> <li>• Implementation begins; application available for use for Fall 2024 applications</li> </ul> <p>Fall 2024</p> <ul style="list-style-type: none"> <li>• Common application online and ready for new students to apply</li> </ul>

<p><i>those who support them to a wide array of public and private colleges and universities across all 50 U.S. states, and 20 countries."</i></p> <p>The investment will allow us to join all other Oregon Public Universities using this application. Further, the platform introduces another tool to improve enrollment and operational efficiency.</p>			<p>Annual Membership Fee = \$2,500</p> <p>Payment transaction fee, if applicable (only for members charging an application fee) - \$2.00 per online application fee payment processed</p> <p>Not charged when a fee waiver is used</p>	
<p>Establish student resource modules (e.g., student orientation, online course tutorial, registration) for students on Canvas</p>	<p>2023-2024</p>	<p>Student Affairs, Academic Affairs</p>	<p>No</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>● Modules developed Fall 2024</li> <li>● Modules ready for use</li> </ul>
<p>Create a virtual option for student</p>	<p>2023-2024</p>	<p>Student Affairs, New Student &amp; Family</p>	<p>No</p>	<p>2023-2024</p>



<p>orientation for remote/online students, commuter students, and transfer students</p>		<p>Programs, Academic Affairs, Academic Innovation, University Computing Solutions</p>		<ul style="list-style-type: none"> <li>● Review what was facilitated during the pandemic</li> <li>● Determine use and need for virtual options to be updated</li> <li>● If need established:             <ul style="list-style-type: none"> <li>● Update materials</li> <li>● Develop implementation plan</li> </ul> </li> </ul> <p>Summer/Fall 2024</p> <ul style="list-style-type: none"> <li>● Ready for use</li> </ul>
<p>Mid-Term</p>				
<p>Review, evaluate, and revise advising systems and structures</p> <ul style="list-style-type: none"> <li>● Review of advising model including assessment of LEAD Advising pilot so far</li> <li>● Assess effectiveness and places we are creating inadvertent inequities</li> </ul>	<p>2023-2025</p>	<p>Student Success and Advising, Academic Affairs Consulting with Student Affairs, Admissions, Financial Aid, Registrar</p>	<p>No funding requested for review process, however, additional funding request anticipated</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>● Review completed and report generated</li> </ul> <p>Fall 2024</p> <ul style="list-style-type: none"> <li>● Recommendations brought forward to Academic Affairs Council for further consideration</li> </ul>

<p>Review and revise the Code of Student Responsibility and disciplinary procedures to shift to a restorative justice framework</p>	<p>2023-2025</p>	<p>Student Conduct, Student Affairs, Housing</p>	<p>2023-2024 – no funding requests anticipated 2024-2025 – additional funding request anticipated to build capacity and skills to utilize a restorative justice framework <i>Beyond 2025, unknown until plan developed</i></p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>• Finish current review and publication of the Code of Student Responsibility</li> <li>• Update Student Conduct website</li> <li>• Plan developed for capacity building and implementation of restorative justice framework</li> </ul> <p>2024-2025</p> <ul style="list-style-type: none"> <li>• Capacity building and training for utilization of restorative justice framework</li> </ul> <p>Fall 2025</p> <ul style="list-style-type: none"> <li>• Implementation/utilization</li> </ul>
<p>Long-term</p>				
<p>Evaluate the MyWOU app and recommend the best path forward for an app that supports students throughout their time at WOU, including Admissions</p>	<p>2023-2024</p>	<p>University Technology Advisory Committee, University Computing Solutions, Student Affairs, Strategic Enrollment Working Group, Academic Affairs, Associated Students of Western Oregon University</p>	<p>No request during research phase, however, if continuation of app usage or expansion of app usage is recommendation, additional funding request anticipated</p>	<p>Fall 2024</p> <ul style="list-style-type: none"> <li>• Recommendation for pursuing a mobile application utilization for WOU</li> </ul> <p><i>Recommendation based in data from university community, considering:</i></p>

<p>through Graduation</p> <ul style="list-style-type: none"><li>• Themes of access and community throughout the student experience</li></ul>				<ul style="list-style-type: none"><li>• <i>Peer institutions utilization of apps</i></li><li>• <i>What is the potential functionality of an app?</i></li><li>• <i>What do we need in an app?</i></li><li>• <i>What do we want in an app?</i></li><li>• <i>Is an app a vehicle to create community, support student needs, aid in access to and flow of information, etc.?</i></li></ul> <p><i>Recommended ways to collect student perspective:</i></p> <ul style="list-style-type: none"><li>• <i>Tabling in the WUC</i></li><li>• <i>Quick survey</i></li><li>• <i>Listening type sessions for open discussion from students</i></li></ul>
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<b>Recruitment &amp; Retention of Employees</b>				
<ul style="list-style-type: none"> <li>● Applicable Diversity Action Plan Goals: Climate, Recruitment &amp; Retention of Employees, Recruitment &amp; Retention of Students</li> <li>● Applicable Equity Assessment Phase Themes: Diversity &amp; Inclusion, Communication &amp; Technology, Accountability, Physical Environment &amp; Safety, Community, Leadership</li> <li>● Applicable Strategic Plan Values: Diversity &amp; Respect, Community, Accessibility</li> </ul>				
Initiative	Timeline/Due Date	Responsible	Is Funding Needed	Outcomes/Deliverables
Short-Term				
Reimagine onboarding as a six-month to one year process, to include <ul style="list-style-type: none"> <li>● Development of best practices and guidelines to assist with onboarding</li> <li>● Updated checklists for supervisor and employee</li> </ul>	2023-2024	Human Resources and University Partners	No	2023-2024 <ul style="list-style-type: none"> <li>● Human Resources led working group formed to discussion and reimagine onboarding process for all WOU employees</li> </ul> Fall 2024 <ul style="list-style-type: none"> <li>● Best practices and guidelines available ahead of Fall 2024</li> <li>● Checklists including compliance training links available</li> </ul>
Evaluate new employee orientation and restructure as needed	2023-2024	Human Resources and University Partners	No	2023-2024 <ul style="list-style-type: none"> <li>● Review and assessment of what is going well and where are areas for improvement</li> </ul> Fall 2024 <ul style="list-style-type: none"> <li>● Updated NEO training</li> </ul>

<p>Streamline search committee process, to include</p> <ul style="list-style-type: none"> <li>• Consistent basic standards for search committees</li> <li>• Revise search committee training</li> <li>• Guiding documents (rubrics, question repository, schedules, etc.)</li> </ul>	<p>2023-2024</p>	<p>Human Resources, Diversity, Equity and Inclusion, Search Advocacy Learning Community</p>	<p>No</p>	<p>Fall 2024</p> <ul style="list-style-type: none"> <li>• Updated search committee training available</li> <li>• Best practices/basic standards available</li> <li>• Shared templates of guiding documents available (rubrics, question repository, schedules, etc.)</li> </ul>
<p>Improve professional development opportunities for all employees</p> <ul style="list-style-type: none"> <li>• Clarify expectations around compliance training (e.g., Title IX, FERPA, HB 2864, etc.)</li> </ul>	<p>2023-2024</p>	<p>Human Resources, Diversity, Equity and Inclusion, University Computing Solutions, General Counsel, Board of Trustees Secretary, Academic Affairs</p>	<p>Yes, additional funding request anticipated</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>• Group of representative folks establishes expectations</li> </ul> <p>Fall 2024</p> <ul style="list-style-type: none"> <li>• Centralized home for asynchronous compliance training made consistently available at the start of the fall term each year and as new employees are hired</li> </ul>

<ul style="list-style-type: none"><li>● Roll out compliance trainings with clear communication about expectations and ramifications</li><li>● Develop policy for hours used to participate in professional development (e.g., all staff have four hours of time they are expected to participate in professional development each academic year)</li><li>● Review support of faculty professional development and consider how can</li></ul>				<ul style="list-style-type: none"><li>● Policy regarding professional development established</li><li>● Financial support and system developed to support staff professional development</li></ul>
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model similar for staff				
Mid-Term				
Evaluate and update performance management tools that include training, workshops, and resources <ul style="list-style-type: none"> <li>● Include DEI/Cultural competence in performance evaluations with a self-reflection component</li> <li>● Work with shared governance to determine tiers and self-reflection recommendations</li> </ul>	2023-2025	Human Resources, Diversity, Equity and Inclusion, Shared Governance	No	2023-2025 <ul style="list-style-type: none"> <li>● Tools updated</li> <li>● Implementation plan developed</li> <li>● Resources available Fall 2025</li> <li>● Implementation begins</li> </ul>
Develop and implement supervisor specific professional	2024-2025	Human Resources, University Diversity and Inclusion Advisory Committee, Feedback	No	Spring 2025 <ul style="list-style-type: none"> <li>● Professional development available</li> </ul>

<p>development program for supervisors, which is then followed up with a consistently available learning community</p>		<p>from Shared Governance on topic areas/themes</p>		<p>to professional employees</p>
<p>Transition the Center for Academic Innovation to the Center of Teaching and Learning, expand the existing initiatives and resources</p> <ul style="list-style-type: none"> <li>• Objective 1: Quality rubrics are used to inform the design of high quality and inclusive online and hybrid courses</li> <li>• Objective 2: Academic Affairs has an infrastructure to ensure courses are</li> </ul>	<p>2023-2025</p>	<p>Center of Teaching and Learning (formerly Academic Innovation), Academic Affairs, University Partners</p>	<p>Yes, \$194,500 to be paid through sustainability funds. Additional financial needs to be determined.</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>• Academic Innovation transitioned to the Center of Teaching and Learning</li> </ul> <p>2024-2025</p> <ul style="list-style-type: none"> <li>• Objectives met</li> </ul>



<p>high quality and inclusive</p> <ul style="list-style-type: none"> <li>Objective 3: Faculty are equipped with learning opportunities and tools to engage in the work of diversifying and decolonizing curriculum</li> </ul>				
<p>Develop/redevelop and pilot mentorship programs (with consistency in mind, with specific and measurable outcomes)</p>	<p>2023-2026</p>	<p>Academic Affairs, Deans, Academic Innovation (New Faculty Orientation), University Diversity and Inclusion Advisory Committee (Jaclyn Caires-Hurley volunteered to help with effort)</p>	<p>Not in first year, will evaluate financial need when determining scalability and building pilot</p>	<p>2023-2024</p> <ul style="list-style-type: none"> <li>Determine what programs currently exist</li> <li>Determine what data is available to assess effectiveness and what/if any gaps exist in current programs</li> </ul> <p>2024-2025</p> <ul style="list-style-type: none"> <li>Assess current programs and scalability</li> <li>Determine pilot group(s) for additional programs (consider interdisciplinary mentor/mentee relationships)</li> </ul>

				<p>2025-2026</p> <ul style="list-style-type: none"> <li>Continue current programs</li> <li>Pilot new programs</li> </ul>
Long-term				
Engage in a Classification and Compensation Project	2023-2025/Ongoing	Human Resources and University Partners	Yes, consultant (\$123,000), to be paid through sustainability funds. Additional funding request anticipated; to be determined following studies and recommendations.	<p>2023-2025</p> <ul style="list-style-type: none"> <li>Conduct a salary study</li> <li>Conduct a classification study</li> <li>Conduct a pay equity study</li> <li>Report findings and recommendations</li> </ul>
Conduct assessment of promotion and tenure process with an equity lens	2023-2025	Academic Affairs		<p>2023-2025</p> <ul style="list-style-type: none"> <li>Review of process Fall 2025</li> <li>Provide specific recommendations for the Provost and Union based on the results of the assessment</li> </ul>
<p>Development and promotion of junior faculty retention programs</p> <ul style="list-style-type: none"> <li>Consistency within divisions/departments</li> <li>Further clarity of</li> </ul>	2023-2025	Academic Affairs		<p>2023-2025</p> <ul style="list-style-type: none"> <li>Determine what is available and review current programs</li> <li>Unit reviews of historical tenure trends (e.g., successful tenured lines, time to apply and receive Full Professor rank)</li> </ul>

<p>expectations that are easy to find</p> <ul style="list-style-type: none"><li>● Partnerships/mentorships with/for senior faculty support</li></ul>				<p>Fall 2025</p> <ul style="list-style-type: none"><li>● Consistent procedural guidelines and expectations shared with all units</li><li>● Centralized and consistent training and mentoring system for PRC's and tenure track faculty</li></ul>
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## Report for WOU Governance Board – November 2023

Division of Advancement & WOU Foundation | Submitted by Katie Wojke

### WOU Foundation & Development

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#### **Mission:**

The Western Oregon University Foundation exists to strengthen relationships and provide resources in order to serve and support the mission and vision of Western Oregon University.

#### **Advancement Staffing:**

The Advancement team is filling in. Holli, executive assistant, returned from an extended medical leave, and we filled the Director of Alumni Engagement position with alumna, [Raeann Salchenberg](#). Raeann's first priorities are 1) get to know the alumni board members, 2) Homecoming, 3) review and update website, 4) Tree Lighting, and 5) plan series of regional events for Jan. – June 2024.

Searches for the Philanthropy Advisor and Director of Annual Giving & Sponsorships are now both in the applicant screening stage. We hope to bring finalists to campus before Thanksgiving break.

What I'm most proud of is how well this team interacts with and supports each other. They help one another with projects and make themselves available when needed to ensure events are covered.

While not in our department, our new Director of Marketing and Communications, Maureen Brakke, and her team are great partners, and they are helping share alumni and donor news out in the community. In a few short months, we've partnered with them on the [Annual Report](#), several alumni spotlights, [Smith Fine Arts Series new season announcement](#), [alumni award honorees announcement](#), and [new foundation board members announcement](#).

#### **WOU Foundation:**

We added four new board members to the Foundation: Hunter Hall '23 (student representative), Linda Yorke (Smith Fine Arts Series representative), Dave Novotney '95, and Joyce Peters '64. Each brings a wealth of experiences and perspectives to help guide and support the Foundation's mission.

The annual audit was completed with no findings.

### Comprehensive Campaign (please see accompanying report)

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#### **Campaign total, as of 9/30/23: \$10,093,072**

- For FY 23, we raised nearly \$2.9 million, compared to \$2.2 million last fiscal year. This number does include one future estate commitment of \$500,000. In prior years only realized estate gifts were being counted. Going forward, we will count documented future estate gifts in our fiscal year and campaign numbers as this is best practice. Reports will also show new activity each year (outright gifts; pledges; future estate commitments) rather than just gifts received (outright gifts and pledge payments). We do not want to double count anything in our reporting of the campaign. These gifts will of course be part of our financial statements.
- FY 24 outright gifts and commitments as of 9/30/23: \$340,573

- This number does not include any pledge payments so as to avoid double counting in the campaign report.
- **Initial Findings from Campaign Momentum Conversations (with our consultant)**
  - Deep love for Western Oregon University.
  - Alumni especially appreciate the strong relationships built between faculty/coaches/staff and students, and between students.
  - The stellar reputation of the College of Education—and its far-reaching impact through educating such a significant portion of Oregon’s (and other Western States’) teachers and educational administrations—has had a profound impact on the State of Oregon and the greater region.
  - The beautiful campus and proximity to a quintessential college town make WOU an evermore attractive educational home for today’s students.
  - Limited Foundation staff and resources have contributed to a lost connection between many alumni and the university.
  - A passionate set of champions is committed to re-engaging fellow alumni, continuing steady annual support, and where possible considering major commitments of special assets such as IRA Qualified Charitable Distributions, bequest gifts, and life insurance gifts.
- **Next Steps**
  - Campaign Momentum Report will be shared with the Foundation ED and Campaign Chair by 11/2.
  - Present Campaign Momentum findings and recommendations to the Foundation Board at their December 9 meeting.
  - Discuss Campaign Momentum Report with all those interviewed in one-on-one visits.
  - Revise comprehensive campaign plan.
  - Launch a Campaign Steering Committee.
  - Support campaign execution, especially major and planned giving strategies and volunteer leadership.

**Prospect Research and Management:**

The module we added to our database is helping us better track and report on Estate Gifts (current and future), memberships (Emeritus Society and Wolves Club), and volunteer engagement.

**Major and Planned Giving**

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**Major Giving and Planned Giving**

- New scholarship endowment at \$25,000 for students in education with potential for additional gifts
- Estate gift from Dr. Eileea Bourne - 20% of her estate, which was approximately \$25,800 – directed to The Fund for WOU
- Final decision on pending gift of property – while this is no longer happening, the donors are very committed to Western and will look for ways to continue supporting students through scholarships
- New CGA at \$50,000 – gift made via IRA. Will eventually add to a scholarship endowment
- Men’s Basketball – collective gift of \$90,000 spearheaded by alumnus

- Pending gift of approx. \$800,000 from a CRUT - policy for unrestricted donations is to split the gift 90/10 between the endowment and current use.
- Received a \$50,000 grant from the Rippey Foundation for scholarships
- Shared three donor profiles on social media for National Estate Planning Awareness Week.
- Planning an event with Unitus CCU to celebrate their bilingual scholarship recipients

### **Grants summary**

We have engaged a local grant writing consultant to assist us with re-engaging past foundation funders and identifying new opportunities. To-date we have worked with them to submit an application (funded), a letter of inquiry (pending), and have had several information gathering conversations with funders and more scheduled.

Together we are working on building a grants calendar. We have identified more than a dozen funders to approach by the end of 2023, and another 6 in early 2024.

Our goal is to have grants become about 10-15% (or more) of our annual and campaign fundraising.

### **Smith Fine Arts Series (SFAS)**

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The Smith Fine Arts Series launched their 46th season:

- LADAMA on October 6th, 2023
- Never Come Down on December 2, 2023
- Rainbow Dance Theatre on January 19, 2024
- Laila Biali on March 16, 2024
- Reverie Road on April 6, 2024
- Makaha Sons on June 8, 2024

SFAS is also preparing for their annual auction fundraiser. The [Embrace the Music Auction](#) is returning in person with a dinner and auction in the Pacific Room in the Werner University Center on the WOU campus. Sponsorships are at the highest level they've ever had for this event. There will be a week-long online auction leading up to the event from November 4 - 11. The live event will take place November 12 at 5pm.

### **Annual Giving**

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- Fall appeal is at the printer and scheduled to be mailed on Nov. 10. The focus is how Western educates future leaders.
- Oregon State Charitable Fund drive for university employees kicked off on Oct. 18
- Starting conversations with departments and individuals about Giving Day (March 5, 2024).
  - Starting to identifying potential matching gifts, challenge gifts, etc.
  - Looking into text messaging
  - Collaborating with Marketing and Communication on a more robust Marketing Plan

### **Alumni and Community Engagement**

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Changes to the Alumni Awards were the focus over the summer. 20 potential nominees were identified. Of those contacted, 13 "accepted" the nomination and submitted additional information for the board members serving as the selection committee to consider. 3 honorees for 2023 were selected: Katherine

Cook, Gustavo Balderas, and Mark Zook. The other 10 will have their nominations carry forward for 3 years. All were honored to be nominated. Several expressed interest in getting more involved.

Events since last report:

- June 3 – Wolves Athletic Auction
- June 16 – Senior Sendoff (supported Communications class in planning)
- June 17 – Commencement (graduates were gifted alumni swag)
- July 4 – Monmouth-Independence parade
- July 8 – Salem Kaizer Mavericks (President threw out first pitch)
- Aug. 3 – Wolves on the Green Golf Tournament
- Aug. 7 – Student Success Center groundbreaking
- Aug. 10 – Eugene Emeralds Alumni and Friends (President threw out first pitch)
- Aug. 19 – Woodburn parade
- Sept. 9 – Football Hall of Fame game
- Sept. 13-15 – Pendleton RoundUp
- Sept. 23 – President’s Tailgate for Wolves Club members
- Oct. 7 – President’s Club dinner
- Oct. 21 – Homecoming and Alumni and Hall of Fame Awards
- Oct. 26 – Volleyball Alumni night
- Numerous other community events representing WOU, including Independence movies and concert series.

Upcoming events:

- Nov. 12 – Smith Fine Arts Series Auction
- Dec. 1 – Holiday Open House and Tree lighting
- Jan. 20 - Men’s Basketball Alumni night
- Feb. 16-18 – Alumni and Friends event in Hawaii with Softball
- March 5 - Giving Day
- TBD – Alumni and Friends event at Portland Trailblazers
- More regional events in the works

**Comprehensive Campaign Performance  
As of September 30, 2023**

<b>Campaign</b>	<b>No. Donors</b>	<b>Avg/Donor</b>	<b>No. Gifts</b>	<b>Avg/Gifts</b>	<b>Total Given</b>	<b>Goal</b>	<b>Over(Under)</b>	<b>%Goal</b>
Grow Student Scholarships	601	\$11,558	2,653	\$2,618	\$6,946,277	\$12,000,000	(\$5,053,723)	57.89%
Enhance Facilities and Fields	13	\$643	52	\$161	\$8,353	\$10,000,000	(\$9,991,647)	0.08%
Advance Instructional Innovation	375	\$1,941	1,017	\$716	\$727,698	\$1,000,000	(\$272,302)	72.77%
Reduce Barriers to Student Success	1,605	\$517	4,140	\$200	\$829,223	\$1,000,000	(\$170,777)	82.92%
Enrich the Student Experience	3,235	\$489	6,900	\$229	\$1,581,520	\$1,000,000	\$581,520	158.15%
<b>TOTALS</b>	<b>5,829</b>	<b>\$1,732</b>	<b>14,762</b>	<b>\$684</b>	<b>\$10,093,072</b>	<b>\$25,000,000</b>	<b>(\$14,906,928)</b>	<b>40.37%</b>

**Actual Counts:** 5,193 \$ 1,943.59 14,606.00 \$ 691.02

**Comprehensive Campaign Performance by Fiscal Year  
Past Fiscal Years End June 30, Current Fiscal Year-to-Date**

<b>Campaign</b>	<b>* 2019-2020</b>	<b>** 2020-2021</b>	<b>** 2021-2022</b>	<b>** 2022-2023</b>	<b>*** 2023-2024</b>
Advance Instructional Innovation	\$1,680	\$97,869	\$149,890	\$413,820	\$64,439
Enhance Facilities and Fields	\$0	\$6,408	\$220	\$1,130	\$595
Enrich the Student Experience	\$5,100	\$392,172	\$495,746	\$621,613	\$66,888
Grow Student Scholarships	\$3,065,560	\$728,880	\$1,280,166	\$1,696,574	\$175,097
Reduce Barriers to Student Success	\$1,752	\$321,744	\$318,322	\$153,852	\$33,553
<b>Totals by Year</b>	<b>\$3,074,092</b>	<b>\$1,547,073</b>	<b>\$2,244,345</b>	<b>\$2,886,989</b>	<b>\$340,573</b>

**GRAND TOTAL \$10,093,072**

**Footnotes:**

\* 2019-20 year equals campaign specific gifts only. Total fundraising for the year was \$5,603,703

\*\* 2021 - 2023 years equals total fundraising and campaign gifts

\*\*\* 2023-24 year equals year-to-date total fundraising and campaign gifts



## Campaign Performance Analysis

<b>Campaign</b>	<b>No. Donors</b>	<b>Avg/Donor</b>	<b>No. Gifts</b>	<b>Avg/Gifts</b>	<b>Total Given</b>	<b>Goal</b>	<b>Over(Under)</b>	<b>%Goal</b>
Grow Student Schola	589	\$10,448.48	2,446	\$2,516.01	\$6,154,156.15	\$12,000,000.00	(\$5,845,843.85)	51.28%
Enhance Facilities an	12	\$631.50	41	\$184.83	\$7,578.00	\$10,000,000.00	(\$9,992,422.00)	0.08%
Advance Instructiona	369	\$1,696.30	956	\$654.75	\$625,936.29	\$1,000,000.00	(\$374,063.71)	62.59%
Reduce Barriers to St	1,445	\$535.63	3,801	\$203.63	\$773,983.00	\$1,000,000.00	(\$226,017.00)	77.40%
Enrich the Student E:	3,123	\$407.17	6,340	\$200.57	\$1,271,587.30	\$1,000,000.00	\$271,587.30	127.16%
<b>GRAND TOTALS:</b>	<b>5,538</b>	<b>\$1,595.02</b>	<b>13,584</b>	<b>\$650.27</b>	<b>\$8,833,240.74</b>	<b>\$25,000,000.00</b>	<b>(\$16,166,759.26)</b>	<b>35.33%</b>
<b>Actual Counts:</b>	<b>4,919</b>	<b>\$1,795.74</b>	<b>13,461</b>	<b>\$656.21</b>				

**A Total of 5 Campaign(s) Listed**

5/11/23

## Campaign Comparison Summary

<b>Campaign</b>	<b>Pre-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>	<b>Future Pledges</b>
Advance Instructional Innovatic	\$0.00	\$1,680.00	\$97,869.16	\$146,840.22	\$379,546.91	\$0.00
Enhance Facilities and Fields	\$0.00	\$0.00	\$6,408.00	\$220.00	\$950.00	\$0.00
Enrich the Student Experience	\$0.00	\$100.00	\$392,172.45	\$495,746.12	\$383,568.73	\$0.00
Grow Student Scholarships	\$1,000.00	\$3,064,560.00	\$728,879.96	\$1,280,165.85	\$1,071,550.34	\$8,000.00
Reduce Barriers to Student Succ	\$0.00	\$1,752.00	\$321,743.75	\$318,347.34	\$132,139.91	\$0.00
<b>GRAND TOTALS:</b>	<b>\$1,000.00</b>	<b>\$3,068,092.00</b>	<b>\$1,547,073.32</b>	<b>\$2,241,319.53</b>	<b>\$1,967,755.89</b>	<b>\$8,000.00</b>
<b>Overall Total:</b>	\$8,833,240.74					