MEETING OF THE WOU BOARD OF TRUSTEES
MEETING NO. 59 – February 13-14, 2024

February 13, 2024
3:00-5:00PM
WERNER UNIVERSITY CENTER | COLUMBIA ROOM
To observe the meeting: wou.edu/livestream
Audio only, call: +1 346 248 7799 US **| Meeting ID:** 810 4838 3366

AGENDA

I.   CALL-TO-MEETING / ROLL CALL

II.   CHAIR'S WELCOME

III.   PRESIDENT'S WELCOME

  1) **Students at the Center:** President Peters & Maureen Brakke, Director of Marketing and Community | Presentation of "The College Tour Video"

I.   STAKEHOLDER UPDATES

  2) **SHARED GOVERNANCE**
      a. ASWOU | Hunter Hall
      b. Faculty Senate | Dr. Steve Scheck.   (pg. 4)
      c. Staff Senate | Adrian Trujillo.   (pg. 5)
  3) **UNION**
      a. SEIU | Jackson Stalley
      b. WOUFT | Dr. Melanie Landon-Hayes

IV.   RECESS

Following the recess, members of the Board of Trustees will participate in a reception with members of the campus community in the lobby of the Welcome Center.

February 14, 2024
CAMPUS COFFEE CHAT
9:00-9:45AM
WERNER UNIVERSITY CENTER | FIRST FLOOR, ACROSS FROM THE FREEDOM
CENTER

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PUBLIC MEETING
10:00AM-3:00PM
WERNER UNIVERSITY CENTER | COLUMBIA ROOM
To observe the meeting: wou.edu/livestream
Audio only, call: +1 346 248 7799 US | **Meeting ID:** 810 4838 3366

AGENDA

II.   CALL-TO-MEETING / ROLL CALL

III.   CHAIR'S WELCOME

IV.   CONSENT AGENDA (Appendix A)

   1) Meeting Minutes:
       a) November 14-15, 2023 Meeting Minutes

   2) FY24 Management Report (As of November 30,2023)

   3) FY2023 Financial Statements Audit

   4) Single Audit (audit of federal funds received)

V.   FIRST PUBLIC COMMENT

VI.   STAKEHOLDER UPDATES

   1) WOU FOUNDATION REPORT | Katie Wojke, Vice President for Advancement
       (pg. 7)

   2) LEGISLATIVE REPORT | Ricardo "Rico" Lujan Valerio, Director of Government
       Relations

VII.   PRESIDENT'S REPORT | President Jesse Peters   (pg. 30)
       (Senior Leadership Reports in Appendix B)

Board of Trustees

VIII. DIVERSITY, EQUITY, INCLUSION & ACCESSIBILITY COMMITTEE (DEIAC)

1) Committee Chair Report | Trustee Susan Castillo

2) Committee Recommendations for Board Discussion/Action
   a. Acceptance of the Equity Assessment Action Plan   (pg. 36)

IX. BREAK

X. LUNCH / SHOWCASE PRESENTATION:

   a. Presentation of the Proposed Western Oregon University Strategic Plan 2024-2030 & Strategic Plan Assessment | Dr. Judy Sylva, Associate Provost for Academic Effectiveness   (pg. 65)

XI. FINANCE & ADMINISTRATION COMMITTEE (FAC)

1) Committee Chair Report | Trustee Gayle Evans

2) Committee Recommendations for Board Discussion/Action

   a. None

XII. ACADEMIC & STUDENT AFFAIRS COMMITTEE (ASAC)

1) Committee Chair Report | Trustee Leah Mitchell

2) Committee Recommendations for Board Discussion/Action

   a. None

XIII. EXECUTIVE, GOVERNANCE & TRUSTEESHIP COMMITTEE (EGTC)

1) Committee Chair Report | Chair Betty Komp

2) Committee Recommendations for Board Discussion/Action

   a. Acceptance of the Western Oregon University Strategic Plan 2024-2030 (pg. 76)

XIV. SECOND PUBLIC COMMENT

XV. ANNOUNCEMENTS/COMMENTS

XVI. ADJOURNMENT

Faculty Senate Report to the WOU Board of Trustees, November 13 – 14, 2024

Since my November 2023 report, the faculty completed fall term and launched a new one. In a way, we launched two winter terms because the inclement weather and campus closure days in week two had faculty scrambling to modify their class schedules. However, one positive adaptation to come out of the Covid years has been the ability of the faculty to switch to remote learning in a pinch. Our ability to handle weather closures now – compared to when I came to WOU in January 2006 – is exponentially better. I wish to convey my appreciation to the staff who keep our Canvas Learning Management platform running, and our computer servers accessible so we can stay connected with our students.

Also, since my last report, Provost Coll and I have had multiple conversations about the Emerit Professor Policy and Senators have also had ample opportunity to engage with the Provost about the draft. After a few final tweaks, I will ask the Provost to submit it to the University Policy Council for formal university review and adoption.

Another topic in which Provost Coll has engaged in considerable discussion with the Faculty Senate was that of the new grading system to be implemented in the 24-25 school year. Although Senators had quite a few questions about the proposed system, they were supportive of the new system. There may be some unknowns, but the benefits to minimizing academic damage to students, especially when they are first starting college, is something I believe we should all celebrate. And, while I have your attention… I'm one of many faculty who believe student success would be further enhance if public colleges and universities in Oregon were on the semester system. Unfortunately, when a student stumbles in a quarter system course… that student doesn't have much time in which to recover before the term is over.

Progress is being made in crafting a more formal policy and procedures process for creation of new academic programs. The team working on this project (referenced in prior reports) is unified in seeing the value, both to the faculty contemplating a new program and to the administration to implement.

Faculty Senate will come to a decision on whether to move Senate- and Division-related meetings from Tuesday afternoons to Thursday afternoons. This would better accommodate the more intense NCAA athletic team travel in the latter part of the week and students who, due to personal obligations, need to more heavily load course meeting times into the beginning of the week. Such a move would start with the 2025 – 2026 Academic Year.

Finally, of direct importance to Trustees, Faculty Senate will be identifying individuals we believe would be quite capable of effectively serving as the new faculty representative to the Board of Trustees when Trustee Foster steps down at the end of this year.

Respectfully,
Stephen Scheck, Senate President

To The Board of Trustees:

Staff Senate, as of January, is fully staffed. It is great to have a full Senate as we continue to move forward with agenda items that have been on hold. For example, Staff Senate has formed a task group that will work with HR to find/develop a clear and consistent definition of Staff and Administration. This group of 5 members is composed of Senators and staff volunteers.

With Giving Day rapidly approaching, the Staff Senate is setting its sights on sustaining funds for our Staff for Student Scholarship. Staff Senate is working with the Foundation office to develop a plan of action for Giving Day; we are currently working on gathering material to provide to the Foundation office. Staff Senate's 2024 Giving Day goal is $1,000. We hope to reach this goal to continue supporting our deserving students.

Staff Senate has continued to offer opportunities for WOU staff to connect with one another on campus. Our Staff Connections subcommittee held bi-weekly walks during the summer and weekly walks this fall term to foster a sense of community across campus, outside of our daily work lives. To that end, Staff Connections organized a Halloween Contest that allowed staff members and offices to show their creativity in office decoration and Halloween costumes, all while providing a fun treat to the students of WOU's Child Development Center. Additionally, Staff Senate continues to recognize a staff member monthly and will continue throughout the school year.

Staff Senate Membership for 2023-2024
New members/positions in bold

New Executive Board: Adrian Trujillo - President, Alexis Morrison - Vice President, Ambre Plahn - Treasurer/Secretary

Classified Senators: Keats Chaves, Pam Flippo, Crystal Ross, Jason Horne, Alexis Morrison, Jenna Otto

Unclassified Senators: Noah Carrillo, Kristen Perry, Ambre Plahn, Adrian Trujillo, **Rip Horsey, Jane Cameron-Jensen**

Western Oregon UNIVERSITY

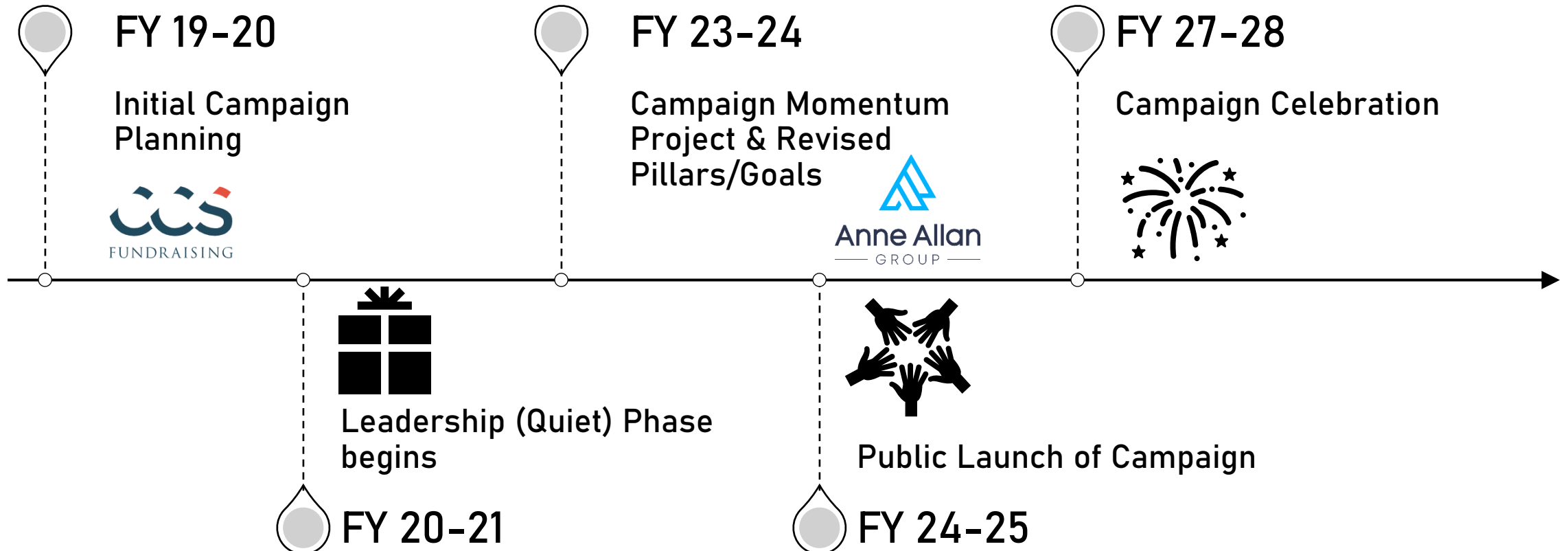# Comprehensive Campaign Update

University Board of Trustees Meeting

February 14, 2024

Katie Wojke, Vice President of Advancement and University Relations
& Executive Director of the WOU Foundation

Overview of Campaign Planning

The Campaign for Western Oregon University

FY 19-20

Initial Campaign Planning

FY 20-21

Leadership (Quiet) Phase begins

FY 23-24

Campaign Momentum Project & Revised Pillars/Goals

FY 24-25

Public Launch of Campaign

FY 27-28

Campaign Celebration

Initial Plan for a $25M Comprehensive Campaign

The Campaign For WOU

The Campaign for WOU will focus on five key areas to secure a brighter future for generations of Wolves to come.

$12M

GROW STUDENT SCHOLARSHIPS

Expand scholarship endowments to provide more students with financial support and increase amount of support awarded per student.

$10M

ENHANCE FACILITIES AND FIELDS

Modernize and re-energize WOU's campus with new student-centered facilities and updated athletics playing fields to upgrade pedagogy and competition.

$1M

ADVANCE INSTRUCTIONAL INNOVATION

Provide faculty and staff with the most up to date tools and training to facilitate the best possible learning outcomes for students.

$1M

REDUCE BARRIERS TO STUDENT SUCCESS

Alleviate student concerns and provide critical support to students that will allow them to focus on academic and professional success.

$1M

ENRICH THE STUDENT EXPERIENCE

Create a lasting connection between students and WOU with initiatives and programs that will provide the best possible collegiate experience

Total Comprehensive Campaign Need: $25 Million

Comprehensive Campaign Momentum

Findings from Fall 2023 Leadership Interviews

Campaign Momentum Project

Confidential Leadership Interviews with:

- University President

- University Provost & VP for Academic Affairs

- Executive Director, Intercollegiate Athletics

- Members of the University Board of Trustees

- Members of the Foundation Board of Trustees

- Members of the Alumni Association Board of Directors

- Campaign Co-Chairs

- Additional Leadership Donors

Campaign Momentum

Points of pride and distinction:

- Personalized student support; staff and faculty are "all in" on student success.

- Small class sizes and a tight-knit community allow for meaningful relationships between faculty and students.

- The direct teaching from faculty (vs. teaching assistants) sets Western apart from the other schools in the state.

- WOU is transforming lives, families, and communities, especially for the 46% of WOU students who are first-generation (to attend college).

- Western plays a regional role in bolstering the state's economy as degree completion is a driver of economic growth.

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Campaign Momentum

Dream for Western, with additional resources:

- Increase student scholarships, both merit and need-based.

- Enhance wrap-around student services, including emergency support and fundamental care (food, clothing, housing).

- Expand athletic scholarships and upgrade athletic facilities.

- Create a vibrant Student Success Center.

- Improve classroom technology.

- Maintain focus on liberal arts and the strength/prestige of top programs such as Education, Criminal Justice, etc.

- Consider new academic programs in high-earning fields.

- Invest in marketing and events to support enrollment and alumni relations.

Comprehensive Campaign Momentum

Recommendations for Campaign Success

Recommendations for Campaign Success

Recommendation A:
Revise the campaign goal to $20M over eight years.

Fiscal Year	Commitments
Early Gifts ($3M endowed scholarship)	$3,074,092
FY 2020-2021	$1,547,073
FY 2021-2022	$2,244,345
FY 2022-2023	$2,866,989
Q1-Q2 of FY 2023-2024, as of 12/31/23	$2,403,822
Campaign Total	**$12,136,321**

Campaign leadership (quiet) phase average fundraising per full fiscal year of $2.2M

$3M + (8yrs x $2.2M) = $20.6M

Recommendations for Campaign Success

Western Oregon
UNIVERSITY

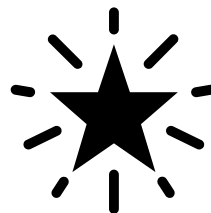Recommendation B:
Reformulate the campaign impact pillars.

Scholarships – $10M Goal
- Endowed Scholarships
- Annual Scholarships

Wolves Athletics – $5M Goal
- Endowed Scholarships for Student-Athletes
- Athletics Facilities – Phase 1: Turf Field
- Wolves Club
- General Athletics Support

Student Success – $5M Goal
- Student Success Center – $1M matching
- Removing Barriers to Student Success
- Student Enrichment
- Faculty Support & Dean's Funds
- General University Support – all other funds

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Recommendations for Campaign Success

Western Oregon UNIVERSITY

Recommendation C:
Continue to evolve the Advancement program.

Annual Fund/ Annual Scholarships

Endowment & Individual Major Giving

Estate/Legacy Giving & Private Foundation Grants

Areas of focus:

- Customized engagement with leadership donors

- Multi-year pledge commitments

- Expanded foundation relations and grant writing

- Review staff resources and expected ROI from Advancement

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Recommendations for Campaign Success

Recommendation D:
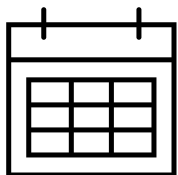**Proceed with preparations for the public phase of the campaign.**

$ **Campaign Goal**

Confirm and Announce
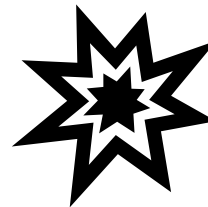
Priorities & Impact

Scholarships
Wolves Athletics
Student Success

Leadership Phase & Public Phase

Timeline of Each Phase
Total Campaign Length

Board & Donor Leadership

Campaign Chairs
Campaign Steering Cmte.
Foundation Board
University Board

Leadership Phase Giving

Way to Participate:

- Annual Giving
- Endowment
- Heritage Society

Comprehensive Campaign Planning

Revisions Adopted by the
WOU Foundation Board of Trustees
on December 9, 2023

Campaign Impact: REVISED Pillars & Goals

## THE CAMPAIGN FOR WESTERN OREGON UNIVERSITY

SCHOLARSHIPS
$10M

Open doors for talented students to pursue their dreams. Increase access to education through merit and need-based scholarships.

WOLVES ATHLETICS
$5M

Strengthen Wolves Athletics through athletic scholarships, facilities improvements, and annual operating support for teams through the Wolves Club.
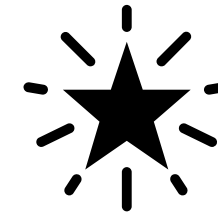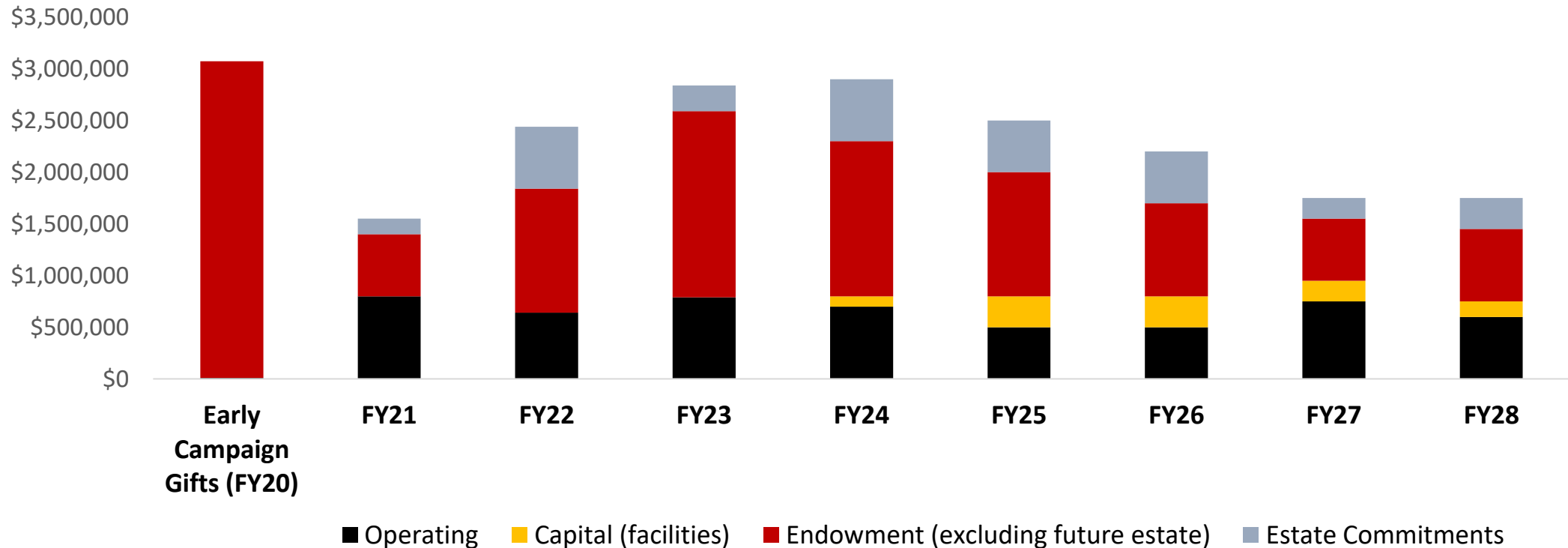
STUDENT SUCCESS
$5M

Create an outstanding student experience, remove barriers to success, provide enrichment opportunities, and build a new Student Success Center.

Projections – NEW ACTIVITY

Comprehensive Campaign Total Fundraising of $21M

Campaign Projections - NEW ACTIVITY (7/1/20-6/30/28)

Timeline & Milestones

Western Oregon UNIVERSITY

Leadership Phase – Years 1-3	Leadership Phase – Year 4	Leadership to Public Phase – Year 5	Public Phase – Year 6-8

FY 20-21 to FY 22-23
(begin counting: 7/1/20)

- Campaign Planning
- Engagement with University and Foundation Boards
- Campaign Chairs *Jan and Mike Morgan* Confirmed
- Early Leadership Gifts Committed
- New University & Foundation Leadership

FY 23-24

- Leadership Gifts Committed
- Campaign Steering Cmte. Established
- Key Marketing Assets & Case Statement Created
- Salon Events Hosted

FY 24-25

- Marketing Ramp-Up to Public Phase
- Leadership Gifts Committed*
- Public Campaign Timeline Confirmed
- Public LAUNCH

FY 25-26 to FY 27-28
(end counting: 6/30/28)

- Campaign Marketing Plan Executed
- Broad WOU Alumni, Donor, and Campus Engagement
- Community Events
- Donor Recognition
- Campaign Celebration

By 12/31/24, total campaign commitments for the first 4.5 years of $14M+ would provide confidence for a public campaign goal of $20M.

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Volunteer Leadership

Campaign Chairs

- Provide Visible Campaign Leadership
- Make Transformational Gifts

Campaign Steering Committee

(12-15 households)

- Advise on Campaign Planning and Execution
- Peer-to-Peer Sharing of Campaign Overview
- Partner on Prospect Strategy
- Host Salon Events
- Make Leadership Gifts

Foundation Board of Trustees

- Champion Campaign
- Personally Thank Key Donors
- Introduce New Prospects & Partner on Strategy
- Make Leadership Gifts

University Board of Trustees

- Champion Campaign & More
- Advocate for Individual and Corporate Giving and Participation at All Giving Levels

University Board of Trustees Leadership

Campaign Champions

Trustee Leadership & Engagement

#WOU GIVING DAY • March 5, 2024

HOWL from the HEART
GIVING DAY
MARCH 5, 2024
Western Oregon
UNIVERSITY

Western Oregon
UNIVERSITY

Go Wolves!

- Drive for participation
- **All gifts celebrated!**
- **Goal of 600 unique donors on one day**
- Many matches available!
- Wolves community effort

Trustee Leadership & Engagement

Go Wolves!

- Drive for participation
- All gifts celebrated!
- Goal of 600 unique donors
- **Many matches available!**
- Wolves community effort

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University Board of Trustees

How would you like to champion the campaign?

Provide Strategic Advice

- Review campaign plans and activities.
- Connect WOU staff with prospective donors.
- Recommend fundraising and donor stewardship approaches.

Host Gatherings

- Convene a small lunch or dinner group to discuss the future of Western.
- Serve as a table host for WOU events.
- Host a community leadership event (Rotary, etc.) featuring Western.

Serve as a Storyteller

- Present on the Campaign for Western Oregon University at business and community events.
- Share, repost, and comment on Western social media stories and news.
- Make thank you calls to campaign donors.

Make a Leadership Gift

- Confirm a multi-year pledge for your annual support.
- Create a special campaign gift such as an endowed scholarship.
- Join the WOU Heritage Society with a planned estate gift.

Questions? Comments?

THANK YOU FOR YOUR LEADERSHIP!

February 14, 2024

President's Report to the Board of Trustees:

Since we last gathered in November, we have successfully completed our Equity Action Plan and the University Strategic Plan; both are on the agenda for BOT approval. These plans mark a new phase for Western Oregon University. This institution has always sought academic excellence, been committed to community engagement, and worked for the success of students and employees. But now we are leaning into new strategies and directions, articulating with greater clarity just what type of institution we plan to be. We are defined by the goals we set, and the new plan will guide us in ways that will improve the university for students and employees alike. We will be an institution characterized by personalized education, belonging, and empowerment.

As you will see in the Strategic Plan (**Education. Innovation. Community**.), we are putting students at the center of everything we do. And that philosophy is directly connected to the Equity Action Plan, a guide that will move us towards real, transformational diversity as we serve our students in ways that make them successful. We strive to be a model of intentional inclusion and accessibility, a place where students and employees alike know they are valued participants in the university community.

Our new plan will be the framework as individual units within the university create and implement their own strategic plans. Centering Students, Embracing Diversity, Fostering Accessibility, and Valuing Community are the core values that will inform our goals and decisions across the institution.

We are proud of what we do at Western, and we are eager to do more. Going forward, we will celebrate our successes and learn from our failures, moving boldly and acting quickly. I am confident that we have the right leadership team in place to guide our collective success. And the employees of this university are actively engaged in making the student experience the best it can be.

Areas of Focus:

1) Enrollment & Budget: As we noted at the last BOT meeting, we started this year with an increase in student enrollment and FTE, marking the first increase in over a decade. We plan to continue this trajectory, and we have increased our marketing and recruiting strategies to accomplish that goal. One great example is the video produced by The College Tour; it showcases the strengths of the university through the words of the students and serves as an artifact we can use in our outreach and awareness campaigns.

We also plan to keep improving our retention rates by enhancing the educational experience as well as the student support and wrap-around services that help them be successful. The construction on our new Student Success building continues to be on schedule. It will house student-facing services in one location. Additionally, we will be moving the Bursar and business office, along with the Registrar to the Welcome Center. This will co-locate additional services students need to engage with: Cashier, Financial Aid, Registrar, and Admissions.

The campus is still engaged in fiscally responsible decision making, and we anticipate savings again this year that will help our fund balance going into the next fiscal year. Though we are still forced to spend some of the reserves to balance the budget, our trajectory to have positive revenue within five years is still on track. Of course, that depends upon many variables including enrollment & retention, tuition rates, future state support, increased expenses, etc.

The focus on out-of-state recruitment and communication includes utilizing our EAB (Education Advisory Board) partnership to build on our recruitment of out-of-state students (expand primary markets, as well as engage in secondary and tertiary markets). The Admissions office is also utilizing a free resource from the College Board called "Connections" for an email campaign to out-of-state students. These efforts are intended to engage all WUE affiliated states, which is not something we have actively pursued in the past. Another strategy Admissions is working on is better utilization of Slate CRM (Constituent Relationship Management) solution. The Parish Group, a higher education marketing and enrollment management firm, is assessing our use of Slate CRM (reviewing existing reports, data queries, etc.), providing training on how to maximize Slate, and serving as a best-practices thought partner.

Fall 2024 Application Data

First time Freshmen applications are up for Fall 2024 from this time last year by 5.6%. Transfer applications are down 23.1%. Overall, applications are up 3.4% over this time last year. When talking with EAB about our application trends, they reported many other institutions are experiencing a downturn in transfer student applications.

2) Marketing & Communications: A comprehensive digital marketing campaign was launched in January. Strategic tactics include streaming video ads, targeted social media campaigns, digital ads, SEO optimization, and Google AdWords. Adding a tangible touch, billboards will be strategically placed to extend WOU's reach. The first billboard is now visible on Hwy 34 between Albany and Corvallis, and in the coming months, there will be two billboards off I-5 (Market Street and Chemawa), one in Grand Ronde off Hwy 18, and another along 99W near Monmouth.

Starting in March, "Students of WOU" project will commence. Throughout the year, various students will be featured on social media, telling their stories and sharing their WOU experiences. The goal is to connect and engage with more prospective students and their families through this project.

Western's social media accounts saw upticks in reach and engagements in January. Compared to December, Instagram saw an increased reach of 70%, Facebook experienced an increased content interaction of 173%, LinkedIn increased new followers by 20%, X (Twitter) had an increased reach of 183%, and TikTok content interaction increased 139%.

3) <u>Sustainability Funds</u>: HECC convened a working group to establish the parameters for distributing the second round of sustainability funds to the TRUs and PSU. There will be a Sustainability Funds Assessment Team created to review proposals. As President, I was asked to designate one member to represent Western Oregon University. Dr. Melanie Landon-Hayes has graciously agreed to serve as our representative. Dr. Landon-Hayes is co-chair of the University Budget Advisory Committee and an active faculty leader on campus and in the community; I have no doubt she will represent us well.

4) <u>Strategic Planning</u>: As mentioned above, the strategic plan is on the agenda for BOT acceptance. The next steps will be for each unit of the university to develop their own strategic plans that articulate specific actions to achieve the overall goals of the university. We will also be launching an implementation and assessment matrix to keep us focused on measuring the outcomes of our actions.

5) <u>New Grading System</u>: Western is poised to be a model in higher education as we implement a strength-based approach to grading that recognizes, embraces, and focuses on student achievement rather than on student failure. By revolutionizing our institutional academic grading system, Western will shift to a grade scale of A through D, eliminating the letter grades of D- and F, instead replacing them with no-credit (NC).

The NC will be used to indicate that the student did not achieve proficiency in the course learning outcomes and will require, just as a grade of F does, that the student retake the course. However, the grade of NC will not have a negative impact on GPA. The new grade annotation is not a mechanism to lower standards, but it is instead a way to focus on student learning outcomes and increase retention and graduation rates. GPA will now be a true reflection of student success and course mastery; failures will no longer mask the demonstrated abilities of our students when they pass courses.

The no-credit grade also empowers faculty and advising staff to proactively help students transition to a different degree or major and enables students to explore and discover academic areas that inspire them. Exploration and change of major have historically been made more difficult by significantly lowered GPAs resulting from weighted grades of F. These

GPAs also create barriers to registration, financial aid, and transfer. Students will have a new incentive to remain in classes longer, rather than dropping them out of fear of getting an "F".

There are many benefits to the implementation of this system, but we will also be vigilant is assessing the outcomes of this change. As we serve the needs of our students and the needs of our state, we recognize that it is time to focus on the successes of students rather than on their failures. We believe in the growth, learning, and potential for all Western Oregon University Students, and this grading policy lets everyone know that we plan to walk with them every step of the way.

6) Human Resources: Starting November 22, 2023, the Human Resources Office partnered with HR Answers, Inc., on a comprehensive compensation project aimed at evaluating our current practices, methodologies, and the alignment of pay ranges and position placements, to ensure internal equity based on job requirements and work assignments. In the initial stages we have begun collecting updated job descriptions that accurately define duties and responsibilities. This project is anticipated to span a duration of at least a year and a half and signifies our unwavering commitment to fairness and transparency within our compensation practices. By the project's completion, we aim to establish a refined and equitable compensation framework that reflects our dedication to recognizing and rewarding the contributions of every member of our workforce.

Total Turnover Rate for 2023: 13.39% (Does not include Non-tenure track faculty)
Total Retention Rate for 2023: 86.61% (Does not include Non-tenure track faculty)

7) Athletics: Western Oregon currently has 442 student athletes. We continue to look for ways to support those athletes and programs while also seeking strategies for financial sustainability. Western does not receive revenue from large TV contracts or corporate donors. I remain actively engaged with the athletic director and state legislators in conversations about the value of athletic programs to regional institutions.

Fall Sports Update

Cross Country- Men finished 4th, Women 6th at GNAC Championship, Men 17th and women 18th at NCAA West Region Championship; (21) earned GNAC All Academic.

Football- Placed 8th in LSC (3-8) record. (13) named LSC Football All-Conference; (1) named LSC All-Academic Team.

Men's Soccer- Placed 2nd in GNAC (11-3-3) record. (7) named GNAC All-Conference; (6) earned GNAC All Academic; Head Coach Michael Behonick named GNAC Coach of the Year.

Women's Soccer- Placed 3rd in GNAC (8-5-6) record. (6) named GNAC All-Conference; (20)

Volleyball- Placed 9th in GNAC (10-16) record. (1) named GNAC All-Conference; (4) earned Academic All-District.

Athletics Academic Information- Fall 2023

Baseball 3.03 (20 academic honor roll, 5 AW)
Men's Soccer 3.22 (14 academic honor roll, 1 AW)
Men's Basketball 2.83 (4 academic honor roll, 3 AW)
Men's Cross Country/Track & Field 3.2 (24 academic honor roll, 6AW, 1 AS)
Football 2.68 (27 academic honor roll, 19 AW, 2 AS)
Women's Soccer 3.63 (21 academic honor roll, 1 AW)
Women's Basketball 3.26 (6 academic honor roll)
Women's Cross Country/Track & Field 3.54 (26 academic honor roll, 1 AW, 1 AP)
Softball 3.44 (14 academic honor roll, 1 AW)
Volleyball 3.52 (12 academic honor roll, 1 AW)

8) HIS Summit: The Hispanic Serving Institution Summit save-the-dates went out in early January, and about 50 individuals have already registered. The primary focus of this year's summit is servingness. In addition to the one-day summit, the working group is planning smaller engagement opportunities in the week leading up to the summit to increase student engagement.

This year's working group 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.

9) HSI Status: As of January 18, 2024, the office of Institutional Research estimates 25.07% of Western's undergraduate students identify as Hispanic/Latino/a/e. While exciting news, it is important to note this number will not be considered official until confirmed and submitted to IPEDs in April. 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 prior to receiving the designation. Once we reach this goal, then we must continue to meet the minimum percentage to maintain the designation. The priority for Western is to function as an institution that truly serves students in positive ways.

The HSI Advisory Committee currently includes: Doris Cancel-Tirado (co-chair), Julian Elizalde, Kathy Espino-Perez, Anna Hernandez-Hunter (co-chair) Rico Lujan Valerio, Mary Pettenger, David Szpakowski, and Dominique Vargas. The committee has recruited two students: Andy Rincon and Daizy Hernandez.

10) <u>Equity Action Planning & Assessment</u>: Western Oregon University continues to engage with Jordan Shelby West, Ph.D. in our university-wide equity assessment activities. The BOT will be asked to accept the Equity Assessment Action Plan during this meeting.
The Equity Assessment Action Plan has been reviewed by the Board of Trustees, Cabinet, The Board of Trustees Diversity, Equity, Inclusion, and Accessibility Committee, Senior Leadership, and various stakeholders listed within the plan. The University Diversity and Inclusion Advisory Committee has continued review and to make updates based on feedback.

I am very pleased at the ways this plan connects to the overall University Strategic Plan. Senior Leadership also reviewed the action plan at the end of January and assigned accountability leaders to each initiative in the action plan to move the work forward. They will be incorporating elements of this action plan into the individual strategic plans for their units.

The next step in the equity assessment is Phase IV. Phase IV is the development, implementation, and analysis of a university wide climate survey. A climate survey committee is being formed, which includes members of Human Resources, Institutional Research, Marketing and Communication, Shared Governance (ASWOU, Faculty Senate, Staff Senate), Student Affairs, and University Computing Solutions. While the survey will be developed by Dr. West, the committee will offer feedback on survey questions. The committee will also develop a communication and implementation plan for the survey. The committee will then ensure implementation of the plans. The committee's work will begin in February 2024 (with formation of the committee) and continue until the end of Fall term (following the conclusion of the survey).

Equity Assessment Action Plan Summary

In June 2022, the Diversity, Equity, Inclusion, and Accessibility Committee (DEIAC) of the Western Oregon University (WOU) Board of Trustees, charged Executive Director of Diversity, Equity, and Inclusion, Dominique Vargas, with leading WOU's efforts to engage in an equity assessment. DEAIC Chair, Susan Castillo, provided Vargas with a list of potential third-party consultants for the equity assessment. Vargas followed up with consultants throughout the summer and narrowed the field to four. These four potential consultants provided WOU with proposals. Senior Leadership chose Jordan Shelby West, PhD, based on her experience with higher education institutions and the multi-year approach she would take to the assessment.

WOU's Board of Trustees approved the financial expenditures for the equity assessment and consultant decision of Dr. West. WOU began conducting the equity assessment in November 2022 with Phase I. Phase I included qualitative data gathering through the use of research, focus groups, and one-to-one meetings. In May 2023, WOU received the Equity Assessment Phase I report from Dr. West. In May 2023, Vargas established an Equity Assessment Team to turn assessment recommendations into initiatives for an action plan for the 2023-2024 academic year. Phase II of the assessment was conducted through a review of student related policy, procedures, programs, etc. The Phase II report was received in August 2023. Phase III of the assessment was conducted through a review of student related policy, procedures, programs, etc. The Phase III report was received in October 2023. This Equity Assessment Team met through September 2023 and established the first draft of the equity assessment action plan. The University Diversity and Inclusion Advisory Committee continued the work of the Equity Assessment Team and met three more times, once in Fall 2023 and twice in Winter Term 2024, which led to the February 2024 draft of the equity assessment action plan for approval.

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 Equity Assessment Team (Team) reviewed all relevant equity assessment materials. The recommendations from the report were first categorized by the equity assessment phase 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 Western Oregon University (WOU) strategic planning process in May 2023: 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 for the action plan: 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 is reasonable to complete or have ready during the 2024-2025 academic year. Mid-term is defined as taking at least two to three years. Long-term is either an overarching goal, such as setting a university priority, or an initiative that would likely take more than three 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, Inclusion, and Accessibility Committee (DEIAC) for review and feedback. The draft plan was also shared with the President's Cabinet for review and feedback. Executive Director of Diversity, Equity, and Inclusion Dominique Vargas also met with several of the stakeholders that would be responsible for action plan initiatives (e.g., Human Resources, Academic Affairs, Student Success and Advising, etc.) to help determine if initiatives were ambitious, but attainable. The University Diversity and Inclusion Advisory Committee (UDIAC) discussed initial feedback and made updates to the action plan ahead of the November 2023 Board of Trustees meeting. Following the Board of Trustees meeting, members of the board had through the end of the year, December 2023) to provide any additional feedback.

This feedback was reviewed and discussed with a small cohort of the UDIAC; due to inclement weather, the meeting was conducted due to the wish to move work forward, with the recognition the group was not as robust as it usually would be. UDIAC met again for final feedback on January 30. Senior Leadership reviewed the plan on January 31 and assigned accountability leaders to each initiative. Then on February 2, the Board of Trustees DEIAC met and discussed a final review of the action plan and recommended it go to the full board for approval in the February board 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 Western Oregon University

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
- Centralize data analysis and reporting
- Ensure all university forms are electronic
- Establish credit/debit card access for all university services

Long-Term
- Technology infrastructure is a brought to industry standards and best practices

Recruitment and Retention of Students
Short-Term
- Provide more opportunities for senior leadership to engage with students
- WOU will join the group of 1000+ colleges/universities using the Common Application
- Update 2/3 tuition hold to set dollar amount
- 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
- Establish clear support systems for first-generation students

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
- Update the university harassment and discrimination policy

Mid-Term
- Transition the Center for Academic Innovation to the Center of Teaching and Learning, expand the existing initiatives and resources.
- 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
- 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

Action Plan Next Steps

The final draft of the action plan is provided in the February 2024 Board of Trustees meeting docket for recommendation for approval.

Following Board of Trustees approval, Executive Director of Diversity, Equity, and Inclusion Dominique Vargas will meet with accountability leaders to review initiatives and next steps.

The Board of Trustees can expect to receive Equity Assessment Action Plan updates at each board meeting within the office of Diversity, Equity, and Inclusion report and the Diversity, Equity, Inclusion, and Accessibility Committee report out.

Committee Recommendation:

 The Diversity, Equity and Inclusion Committee at their February 2nd, 2024 meeting recommended that the Western Oregon University Board of Trustees Accept the proposed Equity Action Plan provided in the docket as written.

Equity Assessment Action Plan

Short-, mid-, and long-term initiatives working toward WOU's Diversity Action Plan goals and in alignment with the new Strategic Plan

Short-term is defined as something that is reasonable to complete or have ready during the 2024-2025 academic year. Mid-term is defined as taking at least two to three years. Long-term is either an overarching goal, such as setting a university priority, or an initiative that would likely take more than three years to come to fruition.

Accessibility
- Applicable Diversity Action Plan Goals: Climate, Recruitment & Retention of Employees, Recruitment & Retention of Students, Facilities & Physical Plant
- Applicable Equity Assessment Themes: Diversity & Inclusion, Communication & Technology, Accountability, Physical Environment & Safety, Community, Leadership
- Applicable Strategic Plan Values: Diversity & Respect, Community, Accessibility

Initiative	Timeline/Due Date	Responsible	Is Funding Needed	Outcomes/Deliverables	Status
Short-Term					
Establish accessibility as the 2023-2024 cultural competence focus for the university	2023-2024	Accountability Leader(s): Executive Director of Diversity, Equity, and Inclusion Responsible Parties: Diversity, Equity and Inclusion office, University Diversity and Inclusion Advisory Committee, University partners	Funding through the allocation of current resources. The office of Diversity, Equity, and Inclusion partners with university departments and/or divisions to cover expenses associated with this initiative.	2023-2024 ● At least one University professional development opportunity each term (fall, winter, spring) based on accessibility ● Attendance tracked at each session - end of the year report including participation breakdown (e.g., classified, unclassified, faculty, etc.) ● Feedback survey following each session - end of the year report	In Progress

				of attendees' self-assessments	
Establish an open-ended contract for Spanish interpreting services	2023-2024	Accountability Leader(s): Executive Director of Diversity, Equity, and Inclusion Responsible Parties: Diversity Equity and Inclusion Office, Marketing and Communication, Human Resources, Student Affairs, Academic Affairs	If services are utilized funding may be requested if a department and/or division does not have resources to cover costs associated with effort. Senior Leadership will determine where the responsibility to cover the cost should come from as needed.	2023-2024 ● Contract between Student Engagement and Professional Interpreters expanded to include all university departments ● Implementation plan developed ● Communicate service availability	In Progress
Promote communication with and utilization of the Office of Disability Services for students ● Office of Disability Services presentations to the WOU community ● Update Western Oregon Web Accessibility Guidelines ● Update Creating	2023-2024	Accountability Leader(s): Vice President for Student Affairs and Director of Marketing and Communications Responsible Parties: Office of Disability Services, Academic Innovation, University Computing Solutions, Diversity, Equity and Inclusion Office, Student Affairs, Academic Affairs, Marketing and Communication	No	2023-2024 ● Western Oregon Web Accessibility Guidelines updated ● Creating Accessible Content in Canvas updated ● Best Practices list/guide developed ● Distribution of materials through university communication ● Accessibility workshop(s) facilitated to educate regarding resources and best practices	

[Accessible Content in Canvas](#) ● Develop list/guide of best practices and considerations for planning more accessible programs and events					
Require microphone usage at all major university meetings and programs; have programs and video communication set up for closed captioning and ASL interpretation	2023-2024	Accountability Leader(s): Vice President for Student Affairs and Director of University Computing Solutions Responsible Parties: WOU Reservations, University Computing Solutions, Facilities, Human Resources, Office of Disability Services, Marketing and Communication	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	2023-2024 ● Determine parameters for what is a major university meeting and/or program ● Establish expectation ● Communicate expectation and how to fulfill expectation to the university community	
Mid-Term					
Equip all university event spaces with equipment for microphone usage	2023-2025	Accountability Leader(s): Director of University Computing Solutions	Additional funding request anticipated following the assessment of need	2023-2024 ● Assessment of need 2024-2025	

and hybrid modality (could include portable equipment in centralized locations for checkout)		and Assistant Vice President for Safety and Operations Responsible Parties: University Computing Solutions, Facility Services, WOU Reservations		● Supplies ordered and installed Fall 2025 ● Spaces ready for utilization
Review and update policy and communication for all-person restrooms ● Include the establishment of a standardized protocol for university restroom and locker room/ changing room usage	2023-2025	Accountability Leader(s): General Counsel and Secretary to the Board of Trustees Secretary & Special Assistant to the President Responsible Parties: Diversity, Equity and Inclusion, Board of Trustees Secretary, General Counsel, Human Resources	No	2023-2024 ● Committee formed for review and revision ● Policy updated ● Implementation plan developed 2024-2025 ● Policy communicated and implemented
Long-term				

Accessibility is a funding priority for Western Oregon University	Ongoing	Accountability Leader(s): General Counsel and Secretary to the Board of Trustees Secretary & Special Assistant to the President
		
		Responsible Parties:
			No funding required for the first step in this priority, however, long-term will need to make budgetary considerations to increase accessibility, to be determined and assessed annually.	2023-2024
				● Develop physical and digital accessibility policies
				   o Committee(s) formed to develop policies
				   o Polices drafted and reviewed

		Facility Services, Capital Planning and Construction, Office of Disability Services, University Computing Solutions. Consider a joint initiative between University Technology Advisory Committee and University Diversity and Inclusion Advisory Committee.		- Public Comment - Approval - Implementation plan 2024-2025 - Physical and digital accessibility policies rolled out 2024-2025 - Committee established to review the 2014 accessibility audit - Review audit - Determine next steps to begin to improve university accessibility, with initial recommendations to Cabinet by the end of Spring 2025	

Technology
- Applicable Diversity Action Plan Goals: Climate, Recruitment & Retention of Employees, Recruitment & Retention of Students, Curriculum & Pedagogy, Business Practices, Facilities & Physical Plant
- Applicable Equity Assessment Themes: Diversity & Inclusion, Communication & Technology, Accountability, Physical Environment & Safety, Community, Leadership
- Applicable Strategic Plan Values: Diversity & Respect, Community, Accessibility

Initiative	Timeline/Due Date	Responsible	Is Funding Needed	Outcomes/Deliverables	Status
Short-Term					
Include the Director of University Computing Solutions on the President's Cabinet	2023-2024	Accountability Leader and Responsible Party: President	No	Fall 2023 ● Director of University Computing Solutions on the President's Cabinet	Complete
Assess utilization of the library's equipment borrowing system ● Increase advertisement for the equipment borrowing system regarding laptops and technology ● Analyze usage and needs	2023-2024	Accountability Leader(s): Provost Responsible Parties: Academic Affairs, Library, University Computing Solutions, Student Affairs, University Technology Advisory Committee	No funding required for the initial step of this initiative, however, long-term may need to make budgetary considerations	2023-2024 ● Report of usage and assessment of need ● Update communication regarding borrowing system Fall 2024 ● Recommendations regarding increased needs or modifications	In Progress
Mid-Term					
Set up guidelines for website architecture	2023-2024	Accountability Leader(s): Director of Marketing and Communications and	No	2023-2024 ● Review and update of the university website begins	

• Review and clean up the university website • Improve accessibility of website • Improve the responsive-ness of website for mobile devices (e.g., phones and iPads) • Review usage of Spanish on website pages and make sure critical information (recruitment, admissions, financial aid, etc.) available in both English and Spanish		Director of University Computing Solutions Responsible Parties: University Computing Solutions, Marketing and Communication, University Partners, and individuals in university community who have website editing permissions		• Establish guidelines for the university community regarding web accessibility, responsiveness, and language Fall 2024 • Guidelines established and shared with the university community to assist website editors in their updates • Additional training for website editors available	
Implement the institutional policy on names	2023-2025	Accountability Leader(s): Secretary to the Board of Trustees Secretary & Special Assistant to the President and Executive Director of	Not anticipated at this time	2023-2024 • Implementation plan drafted 2024-2025 • Implementation plan begins	In Progress

		Diversity, Equity, and Inclusion Responsible Parties: Registrar, University Computing Solutions, Business Services, Financial Aid, Admissions, Human Resources		2025-2026 ● Fully implemented	
Centralize data analysis and reporting	2023-2025	Accountability Leader(s): Provost and Director of University Computing Solutions Responsible Parties: University Technology Advisory Committee, University Computing Solutions, Institutional Research	No funding required for the initial step of this initiative, however, long-term may need to make budgetary considerations	Winter/Spring 2024 ● University Technology Advisory Committee reviews initiative request ● Discussion and review of current data analysis and reporting processes Fall 2024 ● Recommendations for next steps	
Ensure all university forms are electronic	2023-2026	Accountability Leader(s): Director of Marketing and Communications and Director of University Computing Solutions Responsible Parties: University Computing Solutions, Marketing	No funding required for the initial step of this initiative, however, long-term may need to make budgetary considerations	2023-2024 ● Determine course of action 2024-2025 ● Develop implementation plan for converting forms to electronic versions 2025-2026	

		and Communication, All University Offices/Departments/ Units/etc.		● Plan implemented Fall 2026 ● All university forms are electronically available for intended users	
Establish credit/debit card access for all university services	2023-2026	Accountability Leader(s): Director of University Computing Solutions and Controller Responsible Parties: Vice President for Finance and Administration, University Computing Solutions, Business Services	No funding required for the initial step of this initiative, however, funding requests anticipated	2023-2024 ● Determine course of action 2024-2025 ● Research needs and requirements for all university services to be available to be paid for by credit card 2025-2026 ● Develop necessary policies; if applicable ● Develop plan for credit card access and implementation Fall 2026 ● All university services are able to be purchased utilizing a credit card	
			Long-term		
Technology Infrastructure is brought to industry	Ongoing	Accountability Leader(s): Director of University Computing Solutions	Additional funding request anticipated as work through needs assessment to bring the university to industry		

| standards and best practices | | | standards and best practices | | |

Recruitment & Retention of Students
- Applicable Diversity Action Plan Goals: Climate, Recruitment & Retention of Employees, Recruitment & Retention of Students, Curriculum & Pedagogy
- Applicable Equity Assessment Themes: Diversity & Inclusion, Communication & Technology, Accountability, Physical Environment & Safety, Community, Leadership
- Applicable Strategic Plan Values: Diversity & Respect, Community, Accessibility

Initiative	Timeline/Due Date	Responsible	Is Funding Needed	Outcomes/Deliverables	Status
			Short-Term		
Provide more opportunities for senior leadership to engage with students	2023-2024	Accountability Leader(s): Executive Assistant to the President

Responsible Parties: Senior Leadership | President's office to support light refreshments | 2023-2024
- Host one informal fireside chat per term (Fall, Winter, Spring) | In Progress |
| WOU will join the group of 1000+ colleges/ universities using the Common Application

"Common App is a non-profit membership organization representing more than 1,000 diverse institutions of higher education. We connect applicants and those who support them to a wide | 2023-2024 | Accountability Leader(s): Vice President for Student Affairs

Responsible Parties: Admissions, Student Affairs, University Computing Solutions | $5,000 - $10,000 (initial joining fee), $2,500 (annual fee) – initial $10,000 paid through sustainability funds

Details on funding: Implementation fee – one-time cost based on platform (3 levels)
- Essential Platform ($5,000)
- Standard Platform ($7,000)
- Custom Platform ($10,000)

Annual Membership Fee = $2,500 | December 2023
- Signed letter of intent

Spring 2024
- Implementation begins; application available for use for Fall 2024 applications

Fall 2024
- Common application online and ready for new students to apply | In Progress |

array of public and private colleges and universities across all 50 U.S. states, and 20 countries." 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.			Payment transaction fee, if applicable (only for members charging an application fee) - $2.00 per online application fee payment processed Not charged when a fee waiver is used		
Update 2/3 tuition hold to a set dollar amount	2023-2024	Accountability Leader(s): Vice President for Student Affairs and Provost Responsible Parties: Senior Leadership, Registrar, University Computing Solutions, Student Success and Advising, Additional University Partners	No	Winter/Spring 2024 ● Determine financial hold threshold for the balance students can carry and still register Fall 2024 ● Updated threshold communicated ● Updated threshold implemented	

Establish student resource modules (e.g., student orientation, online course tutorial, registration) for students on Canvas	2023-2024	Accountability Leader(s): Vice President for Student Affairs and Provost Responsible Parties: Student Affairs, Academic Affairs, Academic Innovation, University Computing Solutions	No	2023-2024 ● Modules developed Fall 2024 ● Modules ready for use	

Create a virtual option for student orientation for remote/online students, commuter students, and transfer students	2023-2024	Accountability Leader(s): Vice President for Student Affairs and Provost
		
		Responsible Parties: Student Affairs, New Student & Family Programs, Academic Affairs, Academic Innovation, University Computing Solutions
			No	2023-2024
				● Review what was facilitated during the pandemic
				● Determine use and need for virtual options to be updated
				● If need established:
				  o Update materials
				  o Develop implementation plan
				
				Fall 2024
				● Ready for use	

Mid-Term					
Review, evaluate, and revise advising systems and structures ● Review of advising model	2023-2025	Accountability Leader(s): Provost Responsible Parties:	No funding required for the initial step of this initiative, however, funding requests anticipated	2023-2024 ● Review completed and report generated Fall 2024	In Progress

including assessment of LEAD Advising pilot so far ● Assess effectiveness and places we are creating inadvertent inequities		Student Success and Advising, Academic Affairs Consulting with Student Affairs, Admissions, Financial Aid, Registrar		● Recommendations brought forward to Academic Affairs Council for further consideration	
Review and revise the Code of Student Responsibility and disciplinary procedures to shift to a restorative justice framework	2023-2025	Accountability Leader(s): Vice President for Student Affairs Responsible Parties: Student Conduct, Student Affairs, Housing	2023-2024 – no funding requests anticipated 2024-2025 – additional funding request anticipated to build capacity and skills to utilize a restorative justice framework *Beyond 2025, unknown until plan developed*	2023-2024 ● Finish current review and publication of the Code of Student Responsibility ● Update Student Conduct website ● Plan developed for capacity building and implementation of restorative justice framework 2024-2025 ● Capacity building and training for utilization of restorative justice framework Fall 2025 ● Implementation/utiliza-tion	In Progress
Establish clear support systems	2023-2026	Accountability Leader(s):	2023-2024 – no funding requests anticipated, funds	Fall 2023	In Progress

for first-generation students		Vice President for Student Affairs and Provost Responsible Parties: Student Success and Advising, Diversity, Equity and Inclusion, Student Affairs, Marketing and Communication, and University Partners	reallocated from existing Student Success and Advising for position 2024-2026 – additional funding request may occur as further developed	• Reallocate resources to recruit and hire a First-Generation Advisor/Coordinator **Fall 2024** • First-Generation Advisor/Coordinator begins working at WOU **2024-2025** • Establish supporting first-generation college students as the 2024-2025 cultural competence focus for the university **November 2024** • First-generation student day, celebration expanded beyond TRiO Programs **Winter 2025** • First-generation student center opened	
Long-term					
Evaluate the MyWOU app and recommend the best path forward for an app that supports students	2023-2024/Update after Fall 2024	Accountability Leader(s): Vice President for Student Affairs and Director of University Computing Solutions	No request during research phase, however, if continuation of app usage or expansion of app usage is recommendation,	**Fall 2024** • Recommendation for pursuing a mobile application utilization for WOU	

throughout their time at WOU, including Admissions through Graduation ● Themes of access and community throughout the student experience		Responsible Parties: University Technology Advisory Committee, University Computing Solutions, Student Affairs, Strategic Enrollment Working Group, Academic Affairs, Associated Students of Western Oregon University	additional funding request anticipated	*Recommendation based in data from university community, considering:* ● *Peer institutions utilization of apps* ● *What is the potential functionality of an app?* ● *What do we need in an app?* ● *What do we want in an app?* ● *Is an app a vehicle to create community, support student needs, aid in access to and flow of information, etc.?* *Recommended ways to collect student perspective:* ● *Tabling in the WUC* ● *Quick survey* ● *Listening type sessions for open discussion from students*	

Recruitment & Retention of Employees
- Applicable Diversity Action Plan Goals: Climate, Recruitment & Retention of Employees, Recruitment & Retention of Students
- Applicable Equity Assessment Themes: Diversity & Inclusion, Communication & Technology, Accountability, Physical Environment & Safety, Community, Leadership
- Applicable Strategic Plan Values: Diversity & Respect, Community, Accessibility

Initiative	Timeline/Due Date	Responsible	Is Funding Needed	Outcomes/Deliverables	Status
			Short-Term		
Reimagine onboarding as a six-month to one year process, to include - Development of best practices and guidelines to assist with onboarding - Updated checklists for supervisor and employee	2023-2024	Accountability Leader(s): Executive Director of Human Resources Responsible Parties: Human Resources and University Partners	No	2023-2024 - Human Resources led working group formed to discussion and reimagine onboarding process for all WOU employees Fall 2024 - Best practices and guidelines available ahead of Fall 2024 - Checklists including compliance training links available	In Progress
Evaluate new employee orientation and restructure as needed	2023-2024	Accountability Leader(s): Executive Director of Human Resources Responsible Parties: Human Resources and University Partners	No	2023-2024 - Review and assessment of what is going well and where are areas for improvement Fall 2024 - Updated NEO training	In Progress
Streamline search committee process, to include	2023-2024	Accountability Leader(s):	No	2023-2024	In Progress

• Consistent basic standards for search committees • Revise search committee training • Guiding documents (rubrics, question repository, schedules, etc.)		Executive Director of Human Resources and Executive Director of Diversity, Equity, and Inclusion Responsible Parties: Human Resources, Diversity, Equity and Inclusion, Search Advocacy Learning Community		• Review and update search committee member training • Review search advocacy resources and develop WOU search advocacy training Fall 2024 • Updated search committee member training available • WOU search advocacy training available • Best practices/basic standards available • Shared templates of guiding documents available (rubrics, question repository, schedules, etc.)	
Improve professional development opportunities for all employees • Clarify expectations around compliance training (e.g., Title IX, FERPA, HB 2864, etc.)	2023-2024	Accountability Leader(s): Executive Director of Human Resources and Executive Director of Diversity, Equity, and Inclusion Responsible Parties: Human Resources, Diversity, Equity and Inclusion, University	No funding required for the initial step of this initiative, however, funding requests anticipated	2023-2024 • Group of representative folks establishes expectations Fall 2024 • Centralized home for asynchronous compliance training made consistently available at the start of	

• Roll out compliance trainings with clear communica-tion about expectations and ramifications • 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) • Review support of faculty professional development and consider how can model similar for staff		Computing Solutions, General Counsel, Board of Trustees Secretary, Academic Affairs		the fall term each year and as new employees are hired • Policy regarding professional development established • Financial support and system developed to support staff professional development

Update the university harassment and discrimination policy	2023-2024	Accountability Leader(s): General Counsel and Secretary to the Board of Trustees Secretary & Special Assistant to the President
		
		Responsible Parties: Human Resources, General Counsel, Title IX, Board of Trustees Secretary
			No	2023-2024
				● Revise harassment and discrimination policy
				  ○ Drafted and reviewed
				  ○ Public Comment
				  ○ Approval
				  ○ Implementation plan
				
				2024-2025
				● Policy available and ready to use	

Mid-Term					
Transition the Center for Academic Innovation to the Center for Teaching and Learning, expand the existing initiatives and resources ● Objective 1: Quality rubrics are used to inform the design of high quality and inclusive online and hybrid courses ● Objective 2: Academic	2023-2025	Accountability Leader(s): Provost Responsible Parties: Academic Innovation, Academic Affairs, University Partners	Yes, $194,500 to be paid through sustainability funds. Additional financial needs to be determined	2023-2024 ● Academic Innovation transitioned to the Center for Teaching and Learning 2024-2025 ● Objectives met	In Progress

Affairs has an infrastructure to ensure courses are high quality and inclusive ● Objective 3: Faculty are equipped with learning opportunities and tools to engage in the work of diversifying and decolonizing curriculum					
Evaluate and update performance management tools that include training, workshops, and resources ● Include DEI/Cultural competence in performance evaluations with a self-reflection component	2023-2025	Accountability Leader(s): Executive Director of Human Resources Responsible Parties: Human Resources, Diversity, Equity and Inclusion, Shared Governance	No	2023-2025 ● Tools updated ● Implementation plan developed ● Resources available Fall 2025 ● Implementation begins	

● Work with shared governance to determine tiers and self-reflection recommendations				
Develop and implement supervisor specific professional development program for supervisors, which is then followed up with a consistently available learning community	2024-2025	Accountability Leader(s): Executive Director of Human Resources Responsible Parties: Human Resources, University Diversity and Inclusion Advisory Committee, Feedback from Shared Governance on topic areas/themes	No	Spring 2025 ● Professional development available to professional employees	
Develop/redevelop and pilot mentorship programs (with consistency in mind, with specific and measurable outcomes)	2023-2026	Accountability Leader(s): Provost and Executive Director of Human Resources Responsible Parties: Academic Affairs, Deans, Academic Innovation (New Faculty Orientation), University Diversity and Inclusion Advisory	Not in first year, will evaluate financial need when determining scalability and building pilot	2023-2024 ● Determine what programs currently exist ● Determine what data is available to assess effectiveness and what/if any gaps exist in current programs 2024-2025	

				• Assess current programs and scalability • Determine pilot group(s) for additional programs (consider interdisciplinary mentor/mentee relationships) 2025-2026 • Continue current programs • Pilot new programs	
Long-term					
Engage in a Classification and Compensation Project	2023-2025/Ongoing	Accountability Leader(s): Executive Director of Human Resources Responsible Parties: 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	2023-2025 • Conduct a salary study • Conduct a classification study • Conduct a pay equity study • Report findings and recommendations	In Progress
Conduct assessment of promotion and tenure process with an equity lens	2023-2025/Update Fall 2025	Accountability Leader(s): Provost Responsible Parties: Academic Affairs and University Partners	No	2023-2025 • Review of process Fall 2025 • Provide specific recommendations for the Provost and Union based on the results of the assessment	
Development and promotion of junior	2023-2025/Update Fall 2025	Accountability Leader(s):	No funding required for the initial step of this initiative,	2023-2025	

| faculty retention programs Consistency within divisions/ departments Further clarity of expectations that are easy to find Partnerships/ mentorships with/for senior faculty support | | Provost

Responsible Parties: Academic Affairs and University Partners | however, long-term may need to make budgetary considerations | Determine what is available and review current programs Unit reviews of historical tenure trends (e.g., successful tenured lines, time to apply and receive Full Professor rank) Fall 2025 Consistent procedural guidelines and expectations shared with all units Centralized and consistent training and mentoring system for PRC's and tenure track faculty | |

Strategic Plan Implementation & Assessment Framework

Western Oregon UNIVERSITY

Co-design the reporting and use of accessible and culturally and linguistically appropriate materials using multiple modes of communication that present both qualitative and quantitative findings
- Report balance of evidence and any unintended outcomes to inform the next cycle

1 Plan
Document foundational framework (mission, goals, outcome, etc.) and make a plan to assess

- Articulate mission, goals, and outcomes using a culturally competent team with appropriate expertise in what is being assessed
- Identify and target inequities to be addressed and underlying historical, social, cultural, economic, and structural causes
- Understand goals and intended outcomes in a theory of change, including unintended outcomes

4 Act
Close the loop on actions taken for the purposes of continuous improvement

2 Do
Gather and document assessment results and evidence

3 Check
Analyze and interpret the results; make recommendations for improvements

- Engage in participatory analysis and interpretation of findings with people most impacted by findings, and with other partners and collaborators to ensure inclusive meaning-making

- Co-design the questions, learning processes, core concepts, and methods in a participatory approach
- Co-design accessible, culturally and linguistically appropriate data collection instruments.
- Use multiple measures to triangulate and compensate for shortcomings across measures
- Shift from static measures and use TOC to guide measures in conditions, leverage points, alignment, and momentum

Plan
Part 1: Institutional Outcome Alignment

Template for Outcome Alignment

Strategic Plan Outcomes Alignment & Assessment

Divisional Outcomes	University Strategic Plan Outcomes							
	Western adapts to changes in the higher education landscape and implements strategic responses to emerging trends.	Streamlined and efficient processes enhance teaching methods, research capabilities, resource allocation, and administrative efficiency.	The overall quality and richness of the Western community is enhanced by diverse and talented students and employees.	Western Establishes positive, collaborative, and accessible learning and working environments that promote creativity, innovation, and effective teamwork.	Students are supported in a way that fosters satisfaction, belonging, engagement, and empowerment.	Students complete their educational goals and develop a lifelong learning mindset, preparing them for continuous education and professional development throughout their careers.	Students feel connected to a larger community and see the real-world relevance of their academic pursuits.	The Western Oregon University community and community partners work with a sense of shared interest and mutual benefit, navigating external factors, such as economic shifts, policy changes, and global events, with a proactive and adaptive approach.
Academic Affairs								
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Finance & Administration								
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President's Office								
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Student Affairs								
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University Advancement								
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Western Oregon UNIVERSITY

Schedule for Assessing Institution Outcomes

University Strategic Plan Outcome:	Timeline: 2023-24 / 2024-25 / 2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32 Self Study
Institutional Sustainability — Western adapts to changes in the higher education landscape and implements strategic responses to emerging trends.	Plan	do	do	do	check	act	do
Streamlined and efficient processes enhance teaching methods, research capabilities, resource allocation, and administrative efficiency.	Plan	do	do	check	act	do	check
Transformational Diversity — The overall quality and richness of the Western community is enhanced by diverse and talented students and employees.	Plan	do	check	act	do	check	act
Western Establishes positive, collaborative, and accessible learning and working environments that promote creativity, innovation, and effective teamwork.	Plan	do	do	check	act	do	check
Student Success — Students are supported in a way that fosters satisfaction, belonging, engagement, and empowerment.	Plan	do	check	act	do	check	act
Students complete their educational goals and develop a lifelong learning mindset, preparing them for continuous education and professional development throughout their careers.	Plan	do	do	do	check	act	do
Students feel connected to a larger community and see the real-world relevance of their academic pursuits.	Plan	do	do	check	act	do	check
Community Strength — The Western Oregon University community and community partners work with a sense of shared interest and mutual benefit, navigating external factors, such as economic shifts, policy changes, and global events, with a proactive and adaptive approach.	Plan	do	do	do	check	act	do

Key:

Plan: Develop unit strategic plan including outcomes for each goal as well as measures or evidence that will be used to inform the assessment of each outcome. Establish a logic model to monitor the dynamics of resource allocation, strategies, tactics, interventions, or initiatives and outcomes to inform decision-making and a project plan with roles and responsibilities to collect, assess, report, and implement changes for ongoing improvement. Align sub-unit outcomes to unit outcomes and establish a timeline for assessment that informs the assessment of University Strategic Plan Outcomes.

Do: Initiatives will be implemented and outcome evidence will be collected and summarized, and compiled for review

Check: evidence will be assessed relative to the outome resulting in some interpretation of the ways in which the outcome is being realized and implications for improvement in support of maximizing the impact and achieving the aligned goal. Implications will be prioritized and recommendations will be shared to determine alignment with available resources and/or requests for resource allocation or reallocation.

Act: Any recommendations accepted and funded will be implemented and the assessment cycle continues

Western Oregon UNIVERSITY

Do

The University Council will be charged with collecting evidence from outcomes assessment in each university division to inform the assessment of each university strategic plan (SP) outcome.
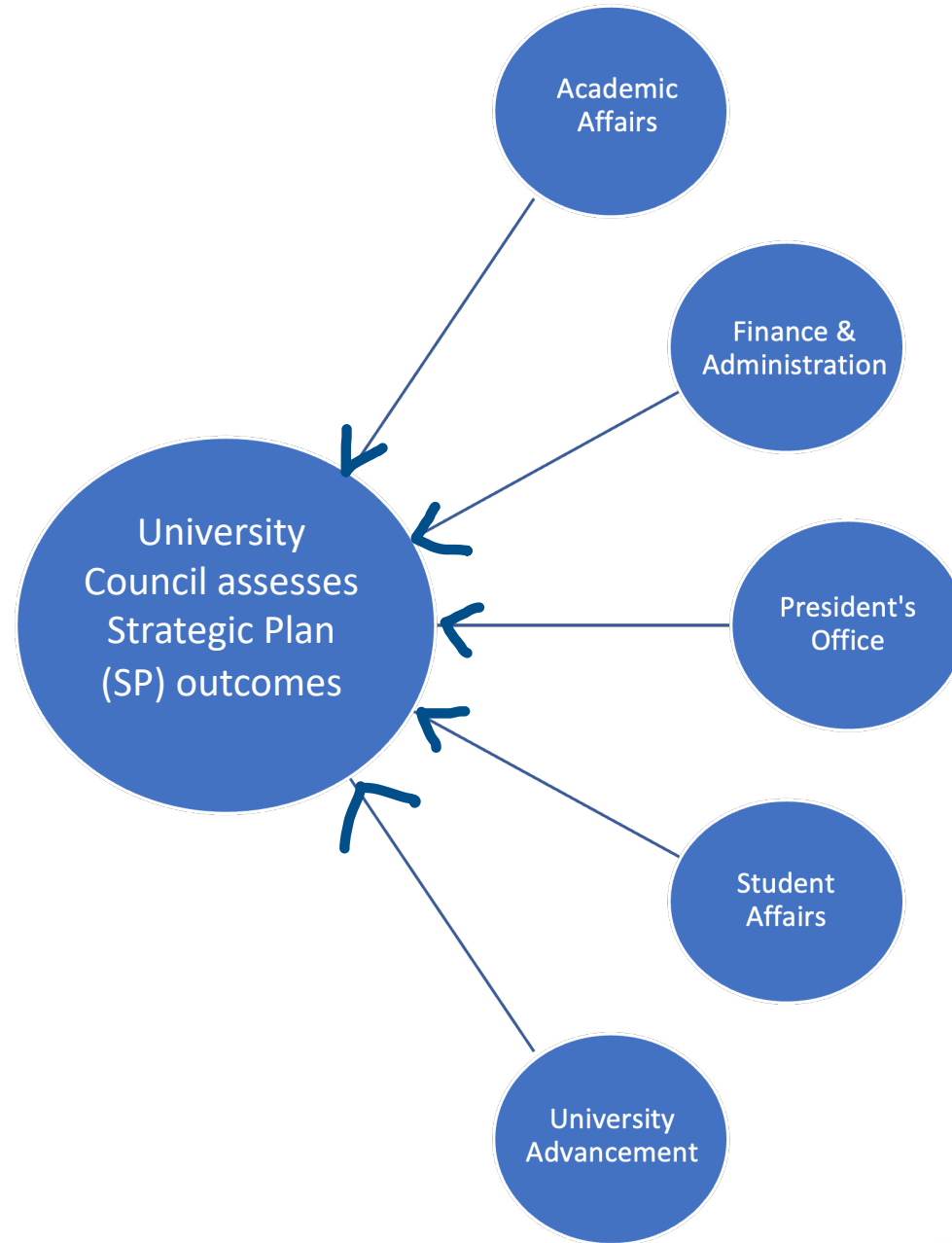
Division SP outcome assessment reports inform assessment of University SP outcomes.

Check 🔍

- Meaning Making

  - *Talking about the results of assessment as a way of **making meaning** of the results is part of the data analysis process and, therefore, it needs to be encouraged* (Love, 2012, p.2).

Love, A. (2012, August). Discussing the data, making meaning of the results. Urbana, IL: University of Illinois and Indiana University, National Institute for Learning Outcomes Assessment (NILOA).

Check (continued)

Reporting

Annual reports will be made by the Divisions to the University Council about:

- Progress in developing plans and aligning outcomes

- Key initiatives being planned or implemented aligned to one or more University Strategic Plan Outcomes

- Interpretations and implications from outcomes assessment in that year

Act

University Council SP Outcome Assessment Report including recommendations for improvement goes back to the Divisions to inform planning and implementation of accepted recommendations.

Western Oregon UNIVERSITY
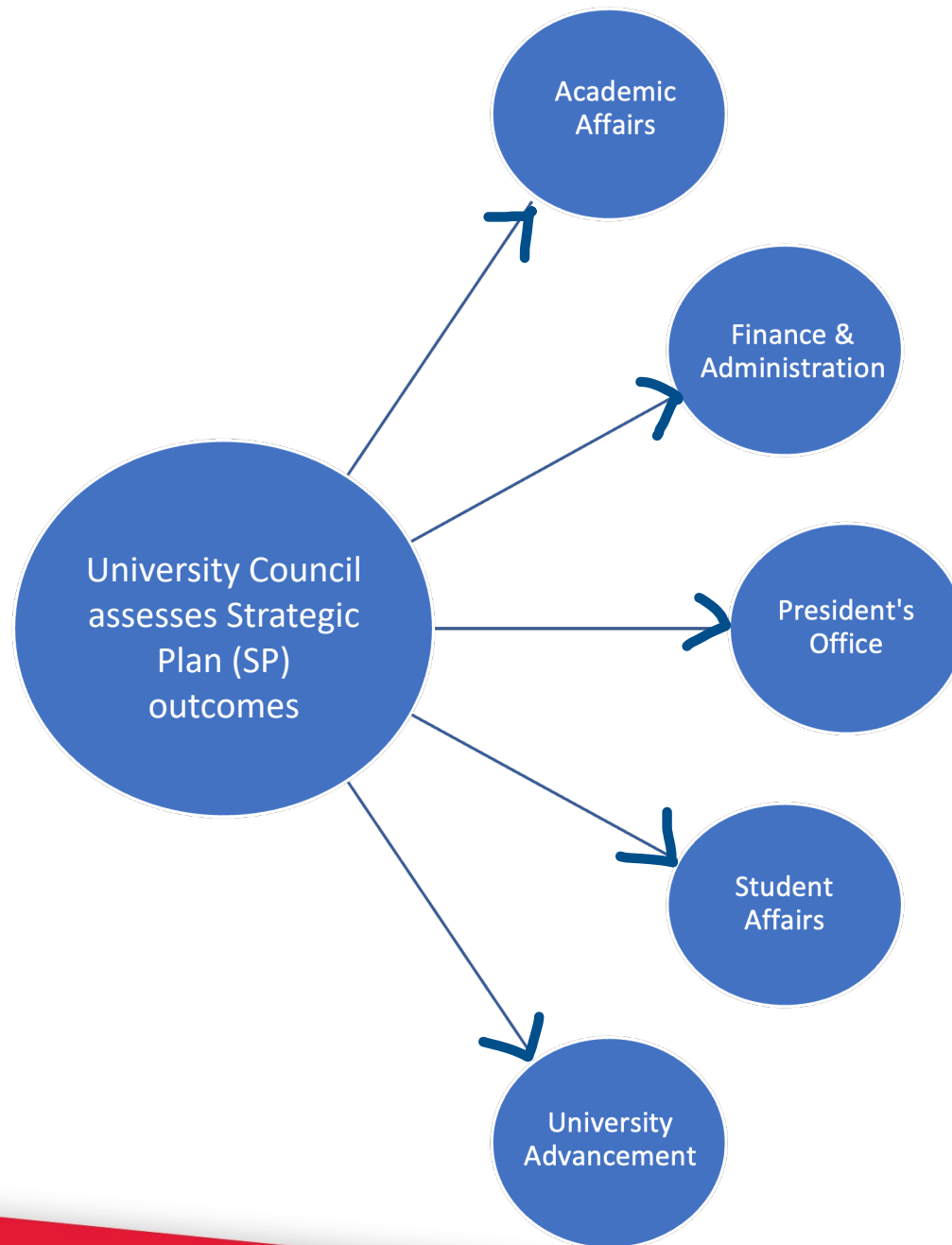
Questions, Comments, Insights???

Contact:

Judy Sylva, Associate Provost for Academic Effectiveness

sylvaj@wou.edu

Western Oregon University Board of Trustees Meeting February 14th, 2024

Western Oregon University Strategic Plan 2024-2030

With the Forward Together 2017-2023 Strategic Plan ending, President Peters announced in the Winter of 2023 that Associate Provost Judy Sylvia would lead the strategic planning process. Associate Provost quickly assembled a committee of members from across the campus that helped her lead the over eight-month process. This process included open discussion meetings, using a survey tool, and coming up with a draft that the University Council, Senior Leadership, and President Peters reviewed.

The version in front of the Board of Trustees is the final result of those efforts, which is the Western Oregon University Strategic Plan 2024-2030.

Committee Recommendation:

The Executive, Governance, Trusteeship Committee, at their February 2nd, 2024 meeting, voted to recommend to the Western Oregon University Board of Trustees the Approval of the Western Oregon University Strategic Plan 2024-2030 as written in the docket.

Education. Innovation. Community.

Western Oregon University
Strategic Plan 2024-2030

Introduction

Strategic Plans in higher education have traditionally been lengthy documents that did two things. 1) They attempted to describe in great detail every possible goal of a university, and 2) They did it in way that few could understand. This led to jokes about 400-page plans sitting on shelves gathering dust. I set out to do something different this time.

As you can see in universities that are making successful moves, and as many successful corporations have shown us, the benefit of a strategic plan is to provide the philosophical framework that empowers individuals and units to develop and achieve goals. It should be short, focused, defining, and memorable.

This new plan is the culmination of hard work by many people on campus. We established a Strategic Plan Committee who led campus conversations, gathered feedback with a survey, and consulted with faculty, students, and staff. The University Council and Senior Leadership also provided direct input. The planning began by evaluating the previous strategic plan, Forward Together, paying close attention to its merits and weaknesses. The goal then became to draft a new plan that builds on the philosophies in the old plan but moves Western Oregon University in new directions.

A strategic plan is both aspirational and inspirational. It sets a tone and provides a clear framework that the university can use to set objectives and make decisions. This plan explains who we are as an institution as well as who we plan to be. It points us clearly and directly into a future that is student-centered and built upon clear core values. And it explains to everyone that Western Oregon University is an institution built on **Education, Innovation, and Community**.

The next step will be for each main unit of the university to draft their own strategic plans that articulate the specific goals, objectives, and actions that we will use to meet the larger institutional goals. This process will demand that members of those units provide input and

develop key measures and benchmarks as those plans are crafted, implemented, and evaluated. They will also be expected to incorporate relevant elements of the Equity Action Plan into their strategic plans. And there will be clear metrics finalized for each outcome.

This will be a living document that can grow and evolve as we engage in our work. We will learn from the assessment and evaluation of our actions, making timely and needed adjustments to ensure successful implementation of the plan. And we will be guided by our Mission, Vision, and Core Values.

Strategic Plan Development Team

- **Judy Sylva**, Associate Provost (Project Lead)
- **Chelle Batchelor**, Dean, Library & Academic Innovation
- **Luanne Carrillo**, Interim Director, Multicultural Student Services & Programs
- **Rian Gayle**, Director, Office of Disability Services
- **Connor Goehring**, Student Senate President 22-23
- **Maddux Gillett,** Student Senate President 23-24
- **Malissa Larson**, Associate Vice President of Student Affairs
- **Omar Melchor Ayala**, Assistant Professor, Criminal Justice
- **Jasmine Miller**, Assistant Athletic Director
- **Denise Thew**, Associate Professor, Division Chair, Deaf and Professional Studies
- **Katie Wojke**, VP Advancement & University Relations

Mission Statement

Western Oregon University provides a personalized learning community where individuals experience a deep sense of belonging and empowerment.

Vision Statement

Our vision is for Western Oregon University to be a model of intentional inclusion and accessibility. We strive to empower students to meaningfully impact our local community and beyond. Grounded in the principles of a public liberal arts education, we will enhance career and social mobility through a focus on critical thinking and communication skills that are essential for successfully navigating the complexities of life.

Core Values

Our core values are the fundamental beliefs and guiding principles that shape the identity, culture, and actions of Western Oregon University. They serve as a foundation for planning, implementing, and evaluating initiatives. Decisions, interactions, and priorities will reflect the deeply held convictions that contribute to the ethical framework and mission of the institution.

Centering Students

At Western Oregon University, we put students first in everything we do. We are dedicated to enhancing the student experience by continually developing and improving the ways we work. Our decision-making is guided by a commitment to meeting student needs through innovation, inspiration, and data. We actively seek student input, ensuring their voices are heard and considered.

Embracing Diversity

Western Oregon University values the unique qualities and differences that make our community strong. Diversity is a positive, transformational force, and we work to foster meaningful inclusion, empathy, open communication, and a willingness to understand and learn from each other.

Fostering Accessibility

At Western Oregon University, we work to ensure inclusivity and eliminate barriers in our physical, social, and learning environments. We are dedicated to continuous improvement so that every member of our community can engage, contribute, and succeed.

Valuing Community

Western Oregon University is dedicated to building strong communities within the university, as well as in the region, in the state, and beyond. We proactively cultivate relationships and partnerships to enhance the education of our students and serve the needs of the community. Our institution is committed to civic engagement, economic development, and cultural enrichment.

Goals, Metrics, and Outcomes

1) Institutional Sustainability

Institutional sustainability refers to the ability of an educational institution to operate in a manner that meets the needs of the present without compromising future success. It involves a commitment to environmental, social, and economic practices that contribute to long-term viability and resilience.

Goal: Enhance the financial stability and sustainability of the institution through strategic financial planning, responsible resource allocation, and innovative revenue-generation initiatives, ensuring long-term resilience and success.

Sample Metrics: Fund balance; net revenue; enrollment; employee retention; endowment; state funding allocation; system efficiency

Outcomes:
- Western adapts to changes in the higher education landscape and implements strategic responses to emerging trends.
- Streamlined and efficient processes enhance teaching methods, research capabilities, resource allocation, and administrative efficiency.

2) Student Success

Student success is a comprehensive and multifaceted concept that encompasses various aspects of a student's educational journey and overall development. It goes beyond traditional measures of academic achievement and includes personal growth, well-being, and readiness for future endeavors. Student success is a dynamic and evolving process that recognizes and celebrates the diverse pathways and aspirations of individuals within the educational community.

Goal: Enhance degree completion rates for undergraduate, graduate, and transfer students, through strategic initiatives focused on academic support, streamlined pathways, and the necessary services that ensure timely and successful attainment of their educational goals.

Sample Metrics: 4 and 6-year graduation rates of first-year cohorts and transfer; 2 and 4-year graduation rates for community college transfer; completion rates for graduate students; job placement rates; access to and use of student support services

Outcomes:
- Students are supported in a way that fosters satisfaction, belonging, engagement, and empowerment.
- Students complete their educational goals and develop a lifelong learning mindset, preparing them for continuous education and professional development throughout their careers.

3) Transformational Diversity

Rather than simply looking at numbers and data metrics as the defining measurements for a diverse environment, a belief in transformational diversity demands thoughtful and engaged actions that result in real and meaningful change. Transformational diversity focuses on developing and implementing diverse and inclusive philosophies and practices while evaluating and analyzing the effects on the institution.

Goal: Foster an inclusive educational, living, and work environment at Western Oregon University, ensuring that students and employees feel a profound sense of belonging and have abundant opportunities for growth and success.

Sample Metrics: Campus Climate Survey; employee retention and advancement/promotion data; student retention and persistence data; NSSE Engagement Indicators; Equity Action Plan outcomes; HSI designation

Outcomes:
- The overall quality and richness of the Western community is enhanced by diverse and talented students and employees.
- Western establishes positive, collaborative, and accessible learning and working environments that promote creativity, innovation, and effective teamwork.

4) Community Strength

A university is built around a variety of communities. Classrooms, departments, units, divisions, teams, interdepartmental work groups, etc. are made up of individuals who must navigate multiple voices and perspectives. Strengthening the ways that communities interact, paying close attention to accessibility, collaboration, and communication allows employees and students alike to grow in positive ways.

Goal: Cultivate and maintain a culture at Western Oregon University that embraces collaboration, connection, and communication as we build meaningful partnerships with internal and external communities, while enriching the educational experience of our students.

Sample Metrics: NSSE data on High Impact Practices, specifically service learning and internships or field work; Engagement Indicators, specifically campus environment; partnerships with local businesses, organizations, schools, and government entities

Outcomes:
- Students feel connected to a larger community and see the real-world relevance of their academic pursuits.
- The Western Oregon University community and community partners work with a sense of shared interest and mutual benefit, navigating external factors, such as economic shifts, policy changes, and global events, with a proactive and adaptive approach.