

REPORT OF THE WSCUC TEAM

SPECIAL VISIT

To Menlo College

November 14 – 16, 2018

Team Roster

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The team evaluated the institution under the 2013 Standards of Accreditation and prepared this report containing its collective evaluation for consideration and action by the institution and by the WASC Senior College and University Commission (WSCUC).

The formal action concerning the institution's status is taken by the Commission and is described in a letter from the Commission to the institution. This report and the Commission letter are made available to the public by publication on the WSCUC website.

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SECTION I – OVERVIEW AND CONTEXT

A. Description of Institution, Accreditation History, as relevant, and Visit

Description of the Institution

Menlo College (Menlo) was founded in 1927 as a private, residential, junior college for men. After completion of studies, graduates transferred to a four-year college or university to complete requirements leading to a baccalaureate degree. In 1949, business administration was established as a four-year program. Since that time, the college evolved into a coeducational, four-year, baccalaureate degree-granting institution. Menlo's mission is to ignite potential and educate students to make meaningful contributions in the innovation economy.

Menlo College is located on a 40-acre campus in the residential community of Atherton, California and in close proximity to Stanford University in Palo Alto. Atherton is located approximately 25 miles equidistant from San Francisco and San Jose, California in the center of Silicon Valley. The surrounding towns of Menlo Park and Palo Alto offer a large array of cultural and recreational activities.

Menlo is small, enrolling around 760 students, allowing for small class sizes. In fall 2017 the average class size was 18, and 59% of sections had 20 or fewer students. The college is committed to traditional, face-to-face instruction on a single campus. The only degrees students can earn at Menlo are in business or psychology, with about 90% of students earning a business degree. For the fall 2011 cohort, the six-year graduation rate was 53%.

Accreditation History

Given the concern by the Commission that visiting teams have found the same problems through multiple cycles with inadequate response to the concerns, this report will go back twelve years in reviewing interactions for the past twelve years. Beginning with Menlo's previous reaccreditation cycle, a Capacity and Preparatory Review (CPR) was conducted in October 2006. The college's CPR report and the evaluation by the CPR Team highlighted the new institutional vision and mission statement, curricular and co-curricular live- learn initiatives, revitalization of the general education program, a comprehensive inventory of institutional data, and the college's budget. The CPR Team report included a substantial list of recommendations related to all four Standards. The Commission found that the college did not meet Standards 1, 3, and 4, with significant issues arising under Standard 2. The Commission acted to continue accreditation, issue a formal Notice of Concern, extend the length of the Educational Effectiveness Review (EER) Visit by one day in fall 2008 to address issues from the CPR, and request a progress report by November 1, 2007 detailing an action plan for addressing the wide range of issues related to the Criteria for Review cited in the February 27, 2007 action letter.

On January 25, 2008, a panel of the Interim Report Committee (IRC) met to evaluate Menlo's Progress Report, which detailed an action plan as requested by the Commission in the February 2007 action letter. In a letter from the Commission dated February 1, 2008, the panel noted no formal action on the college's mission or a renewal of program review guidelines, which left questions regarding the adequacy of shared governance procedures. Also noted was a concern about the college's financial condition in light of enrollment declines, lack of fundraising successes, a projected deficit for that academic year, no detailed retrenchment plans, and continuing controversy with the Menlo School regarding an endowment bequest and facilities when the two parties separated. The panel requested a full financial profile no later than August 1, 2008 and noted that the profile should include the composite ratios required by the U.S. Department of Education. In addition, for the fall 2008 EER visit, the panel requested a full examination of the strategic planning process to demonstrate how it would integrate academic and financial planning, inform day- to-day decisions, have campus-wide support, and demonstrate how the college would continue to make progress towards its educational goals while addressing the precarious financial condition.

The EER visit took place from September 30, 2008 to October 3, 2008. In the Commission Action Letter of February 28, 2009, the Commission noted a number of areas for continued attention, including financial stability and the relationship with the Menlo School, faculty enhancement, retention and assessment activities, strategic planning, educational effectiveness, and program review. The Commission acted to remove the formal notice of concern, reaffirm the college's accreditation, and request an interim report to be submitted by November 11, 2012, covering implementation of the strategic plan, enrollment trends, financial stability, as well as analysis of the development of a new general education program, of new co-curricular initiatives, and of refreshed major programs. The Commission also acted to schedule the next visit for fall, 2015.

Menlo submitted to the Commission a structural change proposal for a new Master of Business Administration (MBA) program, and the structural change site visit took place on September 16, 2010. The Commission Letter of January 28, 2011 noted approval of the MBA program, to be implemented within two years. Subsequent to this approval, the college strategically refocused on remaining an undergraduate institution and decided not to pursue implementation of the MBA.

On November 11, 2012 the college submitted an Interim Report and attachments via LiveText as requested by the Commission, and an IRC call took place on November 29, 2012. In the subsequent letter of January 11, 2013, the IRC took note of the Institution's progress on all areas of concern, urged

Menlo to continue its focus on strategic planning, enrollment trends, and financial stability, and urged that “in future reports, data be presented with greater accuracy.”

An Accreditation Visit (AV) was conducted at Menlo in Atherton, California from March 21, 2016 through March 24, 2016. The visiting team evaluated evidence presented by Menlo to support fulfillment of the expectations and intentions of the Core Commitments, the four Standards for Accreditation, the Components of the Institutional Report, the Federal Requirements, the remaining issues stemming from the 2009 EER visit cited in the Commission’s action letter dated February 26, 2009 and remaining issues alluded to in the IRC letter of January 7, 2013.

The AV Team Report identified eight recommendations, including the need for Menlo to: (1) Better understand attrition patterns and improve retention and graduation; (2) Develop a realistic plan for eliminating financial operating deficits; (3) Continue development and implementation of Strategic Plan (including detailed enrollment plan, detailed development plan, branding and marketing, and linking budget to strategic priorities); (4) Continue development of Meaning, Quality, Integrity of Degrees (MQID) at Menlo College; (5) Develop and assess Program Learning Outcomes with faculty ownership; (6) Continue to adapt and implement program review process; (7) Build capacity and leadership of institutional research function; and (8) Increase collaboration and communication to fully implement faculty handbook policies / guidelines with regard to faculty governance.

In June 2016, the Commission acted to: (1) Reaffirm accreditation for a period of six years, with the next reaffirmation process scheduled to begin with the Mid-Cycle Review in spring 2019, followed by the Offsite Review in fall 2021 and the AV in spring 2022; (2) Impose a Formal Notice of Concern; and (3) Schedule a Special Visit in fall 2018 to address the eight recommendations. The Commission expressed concern in particular with potential non-compliance with Standards 2 and 4.

B. Description of Team’s Review Process

A Special Visit was conducted at Menlo from November 13, 2018 through November 16, 2018.
Description of Team’s Review Process

The Special Visit Team evaluated evidence presented by Menlo to address progress on each of the eight recommendations noted in the Commission Action letter dated July 8, 2016. During the Special Visit interviews were conducted with the president, vice president for student success and ALO, provost and vice president for academic affairs, director of intuitional effectiveness, vice

president for enrollment and athletics, dean of enrollment management, vice president for finance and administration and CFO, members of the Board of Trustees, Strategic Planning Committee, Academic Assessment Committee, MQID Task Force, Faculty Steering Committee, Co-curricular and Administrative Assessment Committee, director of the writing center and intensive English program, and open forums with students, staff and faculty. The institution announced the confidential email account to the campus, but no messages were sent to the team through the account.

C. Institution's Special Report: Quality and Rigor of the Report and Supporting Evidence

Menlo's Special Visit Report (SVR) was well organized but did not clearly reflect the progress that was witnessed during the site visit. The report primarily provided documentation on processes followed to address each of the recommendations noted in the Commission Action Letter of July, 2016. The SVR was a collaborative effort facilitated by the ALO. A member of the campus' WSCUC steering committee served as the lead author of each report section. A faculty member took the lead in writing the response to the recommendation regarding faculty governance. The SVR identified supporting contributors and reviewers for each section of the report.

Overall, the SVR characterized the institution as one making incremental progress towards improvement in all identified areas of recommendation. Campus interviews, and additional documentation provided following the team visit provided greater indication of progress on each of the recommendations.

SECTION II – EVALUATION OF ISSUES UNDER THE STANDARDS

A. Issue 1: Better understand attrition patterns and improve retention and graduation

Recommendation 1 from the fall 2016 Accreditation Visit noted that "...the college needs to develop a deeper understanding of student attrition patterns and take action to address achievement gaps across diverse student populations." (CFRs 1.4, 2.7, 2.10, 4.1, 4.2, 4.3)

Menlo has formed a Retention Committee, an At-Risk Student Committee, begun studying attrition, and hired qualified personnel to support institutional research and data analysis. Shortly after the last WSCUC visit, Menlo hired a Director of Institutional Effectiveness (IE) who has helped the campus begin the process of developing standard reports and processes for reviewing data on a regular basis, (CFR 2.10) After the first director left the position, a part-time director was hired. Each director has supported the needs of the college through compiling campus data, reporting to federal agencies, and helped faculty and administrators develop reports on key issues.

The attrition study presentation shared with the team offered a significant amount of detail on process and methodology, but yielded findings that are intuitive and commonly recognized in the persistence literature, including the fact that undergraduates with higher grade point averages, and those with more earned credits, have a higher chance of completing their degree. The team questions what was learned through the study that was not known previously, and recommends examining more complex or nuanced issues related to attrition that can be found in the research, including questions around campus climate, sense of belonging, or other issues such as the role of mid-term warnings as predictors of academic probation, which courses serve as gatekeepers to advancing within a major, etc. These are offered as suggestions for ways to examine the complexity of attrition beyond the data that is currently available. Further, the data could be enhanced through both qualitative and quantitative examination, which may help address concerns about small sample sizes.

The team was also provided with a copy of the peer campus report, including a comprehensive discussion of methodology. The study identified eight institutions as peer colleges, ranging in student enrollment from 50 to over 1000 students, and located in Georgia, Virginia, New York, Massachusetts and other states. While these eight institutions are indeed comparable on the chosen indices (including endowment, six-year degree completion, percentage of students receiving aid), it is not clear how useful this list may be for understanding Menlo's competitiveness in context of other small colleges and universities in California. The report included a list and comparison of Menlo against several California colleges. Most of these were small colleges and located in Northern California. It is not clear how this list was derived, and whether they are cross-application colleges, have strong business or psychology programs, or are otherwise competitors.

During the special visit, the Director of IE noted that "pockets of data existed all over campus" and went on to describe how she was able to collect information from the Ruffalo Noel-Levitz advising survey, NSSE, and exit surveys to identify overlaps that can connect with anecdotal reports from staff. This work, and the sharing of the findings, is a positive step toward engaging faculty and staff in regular evaluation of systematically collected data. The team noted two examples of use of data-informed action to support student retention. One example was the creation of the Summer Bridge program, which was a positive action taken in response to data on under-prepared students. (CFR 2.12, 2.13) Another example offered during the Special Visit was the hiring of professional advisors to complement

faculty advisement, and bolstering academic support (writing, math) to support under-prepared students. (CFR 2.10)

The team noted the absence of the WSCUC Graduate Rate Dashboard in the SVR. The Dashboard shows a Unit Redemption Rate (URR) for Menlo College that is higher than the IPEDS six-year or absolute graduation rate, indicating that Menlo may be doing better than recognized. Menlo College may want to include URR as part of its regular degree completion assessment.

In summary, Menlo College has made progress in examining the student experience and potential barriers to degree completion. In the next several years, retention and completion analyses need to move beyond description of plans and processes, to yield substantive and actionable findings. (CFR 2.7, 2.10, 4.1, 4.3)

B. Issue 2: Develop realistic plan for eliminating financial operating deficits

The Commission recommended that the college develop and implement a realistic plan for eliminating [financial] deficits. (CFR 3.4)

The SVR states that the college has reversed the negative deficit trend noted in the Commission Action Letter [July 8, 2016], and ended 2017-18 with a surplus of \$894,000. According to the SVR, the turnaround was driven by growth in new students and student housing census, among other strategies. While this is true, and progress has been made, it should be noted that the majority of the increase to the June 2018 year end surplus came from contributions, grants and other revenue, representing an increase of \$2,198,151 year over year, constituting an 85% increase. Year over year net revenues from tuition, fees and auxiliary enterprise revenue have decreased \$829,154, or 3.7%, while overall expenses have increased \$877,350, or 3.3%.

New student growth increased by just under 2% per year from 2015 to 2018. However, the growth in new students was not adequate to offset attrition rates, due largely to graduation and also suboptimal retention. Overall enrollment continued to decline slightly per year for the past three years. The Commission, under Recommendation 1, suggested that Menlo invest in the understanding of its attrition issue. The attrition study conducted by the college, while not comprehensive, suggested continued downward pressure on affordability, increased sector-wide competition and a need for

increased student services. It will be important that future financial plans and budgets take these findings into account.

The college spent \$389,967 for the year ending June, 2018 on advertising, mostly through digital channels. This represents approximately 1.8 percent of annual net revenues from tuition, fees and auxiliary enterprises. The number is well below the mean average for universities with enrollments under 2000 students (according to a CASE study). This suggests that the college has room to invest more in advertising. The college should consider conducting an in-depth analysis of each marketing channel with a goal of optimizing productive channels and eliminating underperforming channels. (CFRs 1.4, 2.7, 2.10, 4.1, 4.2, 4.3)

The college is predicting 95-98% occupancy rates in its residence halls through 2023-24 along with a 4% per year rent increase, which is projected to boost rent revenue from \$7.4m to just over \$9.0m per year. While this is reasonable given the trends in Atherton which may be the nation's most expensive housing and renting market [<https://www.rentjungle.com/average-rent-in-atherton-ca-rent-trends/>], the college may consider further investigation into the price sensitivity of students when they are faced with increases in room, board, and tuition.

Another driver of fiscal improvement was increased fundraising results. Contributions and grants contributed 3.0% to total revenue in 2015-16 and increased to 13.3% in 2017-18. The projected trend is scaled back to 9.0% per year to 2024. Major gifts from two donors accounted for 84% of all gifts in 2017-18. Contributions can be a significant revenue diversifier for colleges where tuition and fees generally constitute a high concentration of risk; however, contributions themselves can be considered a risk if not diversified by source.

There were additional contributing factors to the College's turnaround during the past three years. "Constrained expense growth" and "restated depreciation schedule" were posited as additional turnaround strategies. In reviewing the financial reports supplied by the college, the team noted that operating expenses were \$24.4m in 2015-16, \$24.5m in 2016-17, and \$24.8m in 2017-18. Tuition

revenue declined from \$22.1m to \$21.7m during the same period. Ordinarily, it would not be expected that operating expenses would increase in a revenue-declining environment.

The college reclaimed accumulated depreciation for each of the past three years and projects continuing opportunities for the next six years. The team confirmed that depreciation has not been funded. Therefore, this should be treated as a one-time, short-term solution.

On further review of the financial performance and projection supplied by the college, the following factual statements were substantiated:

- For the past three years, tuition and fees grew at an annual rate of 0.9%, while tuition discount grew 3.9%. Tuition and fees are projected to grow 6.8% per year for the next six years. The team finds these projections very aggressive.
- Funds from contributions and releases from restricted funds constituted 6% of total revenue in 2016 and 20% in 2018. This is a step in the right direction and the board should be commended for its long-term support of the college. Given the aforementioned pricing and enrollment pressures, the board may have to consider raising the budgeted \$500,000 per year drawdowns along with additional expense management.
- Net tuition revenue declined at the rate of -2.2% in the past three years and projected to grow 7.2% in each of the next six years. The team finds these projections to be unrealistic and not consistent with recent performance and industry trends.

The team believes that the college continues to make progress towards sustainability. This progress, combined with a very strong balance sheet, highlighted by no long-term debt, bodes well for the college. This being said, the team believes the current financial projections are too aggressive, and a serious effort should be undertaken which focuses on cost reductions, and a better alignment with the allocation of resources with stated strategic objectives. (CFR 1.7, 1.8, 3.4, 3.6, 3.7, 4.5, 4.7)

C. Issue 3: Continue development and implementation of Strategic Plan (including detailed enrollment plan, detailed development plan, branding and marketing, and linking budget to strategic priorities)

The Commission recommended that Menlo continue the development of the strategic plan, following a process based on evidence and that was collaborative in nature. In addition, the Commission recommended that plans for enrollment, development, and branding and marketing be developed, and that the budget reflect allocation to strategic priorities that generate sustainable outcomes (CFRs 3.4, 4.6).

While the team sees progress in strategic planning, the existing written plan did not adequately reflect the collective thought as expressed by the majority of the stakeholders at the college. For example, during the interviews of various stakeholder groups it became apparent that specific student enrollment target market segments have been identified and plans were in process to identify prospective students and strategies to address these markets (e.g., student athletes, transfer students, minority or historically underrepresented populations who are interested in the innovation economy). Work still needs to be done with matching enrollment targets from each segment and allocating appropriate resources to support the enrollment and retention goals. The strategic plan needs to be in alignment with Menlo's mission & vision and should explicitly highlight the college's differentiated offerings and competitive advantages and align them with each market segment. The plan should also include timelines for accomplishment of objectives, and metrics that will allow the tracking of progress, and include clear definitions for successful accomplishment of the strategic plan.

The college has made much progress with their rebranding initiative. We especially commend the college for engaging students in efforts to develop a marketing plan through an innovative new course led by a trustee. Engaging students in real-world application of knowledge towards innovative solutions is a positive example of the mission in practice. To date, this effort has largely been internally focused and is being implemented with external communications and enrollment activities. Faculty, students and staff seem to be very excited about the rebranding campaign and are confident it will resonate with the community as well.

Due to a change in leadership and high turnover in the development office, systemic and long-term planning in fundraising and alumni development has been delayed. It is noteworthy that during this transition period, certain board members have significantly increased contributions. This, coupled with a \$1,800,000 student success grant, a \$250,000 award from an international alumnus, and the recent hiring a qualified staff, puts the college in a good position to further the development of their plan and its subsequent implementation.

Lastly, two of the most important responsibilities of an administration is the allocation of resources which are in alignment with the overall strategy, the stated goals and objectives and the mission of the institution and the long-term sustainability of the organization. All stakeholders the team met with expressed the need for more focus and alignment around human capital. Many people commented on wearing “many hats” and being overworked. Careful attention should be given to the balance and prioritization between athletics, academics and co-curricular activities in an effort to generate sustainable outcomes.

D. Issue 4: Continue development of Meaning, Quality, Integrity of Degrees at Menlo College

During the 2016 AV, the Meaning, Quality and Integrity of the Degree (MQID) Taskforce shared a summary of the meaning of a Menlo education, including key characteristics like experiential learning, community service, and the value placed on fostering a sense of competitiveness and teamwork. The summary was not yet a complete statement of the meaning of a Menlo degree, and while some progress has been made in planning to ensure the quality and integrity of the degree, the MQID statement was incomplete. (CFRs 2.2, 2.2a)

In the 2017-2018 academic year, a new taskforce was formed to continue work on the MQID statement. The taskforce, made up of five administrators and a faculty member, created a plan to guide the development of the MQID statement. The plan is being carried out in the 2018-2019 academic year.

While no formal MQID statement like that required for completing component three of a full institutional report was included in the college’s Special Visit report, during their interview the team found that the Taskforce was able to articulate the three components of the MQID statement. The Taskforce articulated the meaning of a Menlo degree as being captured in the mission statement of the college, the general education curriculum, the learning outcomes of both the institution and the programs, and the unique skills and knowledge that Menlo helps its students to develop in order for their graduates to be career ready (e.g., an entrepreneurial mindset, ethical competencies). Among other approaches, the quality of the degree is ensured through processes that ask students, alumni and key external constituencies (e.g., employers) what is needed, considering this input, and then designing educational experiences to meet these needs. The integrity of the degree is ensured through various assessment processes, like shared learning outcomes for multi-section courses, curriculum mapping for the institutional learning outcomes to make sure students have sufficient opportunity to learn, and articulating outcomes for all educational experiences (both inside and outside of the classroom) that are then assessed. (CFRs 2.2, 2.2a, 2.4, 4.5)

The team encourages Menlo College to continue to regularly engage in reflective conversations about the meaning of a degree, and how they ensure quality and integrity of their degrees. Writing a formal statement may help the college by serving as a guiding document as new initiatives are considered. The team also encourages Menlo to consider this statement as a ‘living’ one that can be adapted and evolved as the college continues to learn from assessment and other quality assurance practices, as well as from the voices of students, alumni, employers and other constituent groups. For example, the Taskforce discussed the possibility of expanding the institutional learning outcomes beyond the WSCUC core competencies to include some of the specialized knowledge and skills that were described in conversation about the meaning of the degree.

E. Issue 5: Develop and assess Program Learning Outcomes with faculty ownership

At the time of the 2016 AV, program learning outcomes were included in the Academic Catalog, but apart from Psychology, program-level, assessment was found to be only in the planning stages. Faculty reported that the Associate Director of Accreditation, Assessment and Institutional Research was responsible for all stages of assessment, with a plan to conduct each program’s assessment as it entered the program review process. Assessment of institution-wide learning outcomes (the five WSCUC Core Competencies) had begun, but faculty were not responsible for their assessment, nor was there a clear plan for assessment of these outcomes. The Commission recommended that faculty take collective responsibility for assessment, and that a detailed plan for meaningful, sustainable assessment be developed. (CFRs 2.3, 2.4, 2.6, 4.3, 4.4, 4.5)

Menlo began its response by building resources for assessment in fall 2016 by purchasing books for an assessment and institutional effectiveness library intended to help faculty develop a better understanding of assessment. In early 2017, an assessment expert was brought in to provide a day of consulting and a half day workshop on assessment fundamentals called “Assuring Student Learning.” (CFR 3.3) In June 2017 the college hired a Director of Institutional Effectiveness (IE), who left the position in April, 2018, and subsequently hired an institutional research consultant in May 2018 who accepted a more permanent, albeit part-time, director of IE role in July 2018.

In fall 2017, IE worked with faculty and the administration to implement a new assessment structure and process. The goals set for academic programs during the 2017-2018 academic year included creating a sustainable and practical infrastructure that includes outcomes, a plan for assessing them and analysis of results, and to “instill a culture of assessment.”

To help instill a culture of assessment, the administration created three assessment committees: (1) Academic Assessment Committee, made up of faculty assessment champions who meet every other month; (2) Co-Curricular & Administrative Committee, made up of staff assessment champions from the co-curricular and administrative units of the college that support student success who meets every other month; and (3) the Menlo Assessment Committee (MAC), made up of representatives from the other two committees and meets once per academic terms. The MAC oversees development and progress of assessment at Menlo and will be responsible for overseeing the program review process.

To assist faculty with developing assessment infrastructure, IE developed a series of templates for seven deliverables by each academic program, including such items as mission statements, outcomes, rubrics, curriculum maps and data reports. During interviews, faculty indicated that these templates prompted thinking and action, but were not generally perceived as useful. Once completed, faculty were given another set of deliverables including an assessment plan and annual report to be completed by May 2018. During the summer of 2018, the new IE director identified assessment champions for each academic program and co-curricular unit, created a shared inventory of existing program assessment materials, and asked the assessment champions to consolidate and clarify the outcomes in existing submitted materials.

During an interview, the assessment champions demonstrated understanding of the basics of academic program assessment, described meaningful use of assessment practice, and appeared invigorated when discussing the ways in which the practice of assessment has engaged them as a community of educators. The team observed that the practice of using evidence to understand and improve learning in courses and academic programs is beginning to become a regular part of the work of educating students at Menlo.

Faculty were able to discuss the ways in which their program learning outcomes align to the institutional learning outcomes (ILOs), ways that they have examined their aligned program learning outcomes, and the importance of examining ILOs. The SVR indicated that some additional assessment of ILOs had taken place since the AV, but there does not appear to be a clear plan for assessing the ILOs moving forward. It will be important for faculty to work through their new committee structures to assess the ILOs on a regular basis. (CFR 2.2a, 2.4, 2.6)

The team appreciates that Menlo College has taken steps toward improving assessment practice, including hiring a part-time IE director, providing some educational resources, and engaging faculty through a committee structure. It is clear that faculty both need and want additional professional

development around assessment, and that additional staff support for assessment would help to increase capacity for academic program assessment, institutional learning outcome assessment, as well as the recent engagement of staff in co-curricular and administrative program assessment. The team believes that plans for an assessment website and assessment workshops on campus, as well as to send faculty and staff to external professional development opportunities, will help to continue to grow assessment capacity at the institution. Increased understanding of the practice and purpose of assessment will help move Menlo toward a culture of assessment.

F. Issue 6: Continue to adapt and implement program review process

Recommendation 6 of the Commission Action Letter states “that the college continue to adapt and implement its program review process” (CFRs 4.2, 4.3).

The program review schedule proposed in 2016 was not implemented, and as a result, no systematic academic program reviews have taken place. Psychology had embarked on a program review process, but did not complete it.

During the Special Visit, the Academic Program Assessment Committee offered a well-informed, positive and engaged perspective on academic program assessment. The committee was comprised of full-time faculty from each of the programs, and members spoke about assessments that have helped them improve courses and their programs overall. They also spoke about the larger scope of program review, especially the value of the external review component. What also emerged was the challenge of leading the program review process among teaching, research and other service responsibilities. Several committee members noted challenges leading assessments and program review efforts, especially for programs with only one or two full-time faculty members. (CFR 4.5, 4.6)

The program review handbook has not been updated and remains a version minimally adapted from another university. The handbook needs further work before it can be useful, and its revision and adaptation for the Menlo community must be a priority. (CFR 2.7, 4.1, 4.4)

It is not clear that the part-time Director of IE will be able to fulfill the institutional research and data analysis work needed while working off-site, and also invest the time needed to support, coordinate and organize the annual program review process for both academic and co-curricular programs (CFR 4.2). While there is a loose system of assessment “champions,” it is not clear how accountability for thoroughness, timeliness and quality of academic program review will be managed. There needs to be both leadership and depth of knowledge in order to accommodate inevitable personnel changes. (CFR 4.4, 4.5, 4.6)

G. Issue 7: Build capacity and leadership of institutional research function

At the time of the 2016 AV, the institutional research (IR) function was in a developing stage. This was in part due to insufficient staffing of the IR function. The Commission recommended that Menlo build capacity and leadership of the IR function, and that it undertake an external review of the function. (CFRs 4.2, 4.3)

In order to both support IR and assessment, the Director of IE position was created. As noted under Issue 5, this position was initially filled in June 2017, that person left in April 2018, a consultant was hired in May 2018 who was then permanently hired as a part-time director in July 2018. The director of IE has nearly two decades of experiences in higher education and institutional effectiveness, including building multiple IR and IE offices.

When the initial IE director was hired, she was tasked with performing a review of the IR function. As a new member of the community with considerable experience, she was able to perform the review in much the same way that an external reviewer would. The review focused on assessment needs, data needed for program review, and efficiencies in completing regular reports. The review resulted in several recommendations intended to bring the IR work into alignment with the aspirational practices outlined by the Association for Institutional Research (CFR 4.2).

The current part-time director of IE is having a positive impact on the ability of the campus community to make decisions that are informed by data. The president remarked that the work of IE has been transformative and allowed him to think differently about decision making on campus. The team observed that campus leadership is generally excited to have data available to them, and that a culture of evidence-informed decision making is beginning to take shape on the campus (CFR 4.3). The director of IE will need to work with the campus to make sure that appropriate data is recorded and made available to her so that greater study of the campus will be possible.

The team recognizes progress in building capacity and leadership of the IR function, and appreciates that the review of the function led to meaningful recommendations for the college. It is unclear how long it will take the IR function to implement the recommendations, especially given that the director is a part-time employee who is only on campus a few days a month, and who has responsibility for IR, assessment and program review. (CFRs 4.2, 4.3)

H. Issue 8: Increase collaboration and communication to fully implement faculty handbook

policies / guidelines with regard to faculty governance

At the time of the visit in 2016, the team was met with some concerns with regard to communication between faculty and administration, as well as shared governance. The Commission

recommended that the college work toward increasing collaboration and communication to fully implement policies and guidelines in the faculty handbook [CFR 3.10].

The SVR and appendices presented some documentation of the changes made in the operations of the faculty senate and in the faculty handbook. The visit provided additional evidence on the progress made in faculty engagement, participation in strategic planning, program review, and assessment of student learning. Meetings with the Faculty Senate Steering Committee confirmed that the Senate meetings are now inclusive, that faculty are more engaged in all aspects of the institution's activities, and that the culture and atmosphere of the campus, as a whole, are significantly improved. The faculty reported a feeling of ownership in the new mission statement and pride in the new branding initiatives. The faculty understand their responsibilities and accountability for the curriculum. Inclusion of adjunct faculty in the operations of committees and with the senate are seen as quite positive. The faculty said that they appreciate the increased transparency in communication from administration and the Board of Trustees.

Improvement in overall communication among and between board members, administration, and faculty was noted throughout the visit, with all stakeholders. The president and faculty reported that president's participation with faculty in some of the student-facing activities, as well as in some of the social community events, has helped bridge any previously perceived divides. The board commented on increased collegiality with and among the faculty.

Changes made in the faculty handbook have improved the understanding of the operation of the senate. The handbook still needs additional edits for correcting titles, positions, responsibilities and accountability. As stated in the SVR, the institution recognizes the inconsistencies, especially in the area of faculty evaluation, this continues as a work-in-progress. Menlo should address the differentiation between senate by-laws (operations of the Senate) and the rights and responsibilities of faculty (academic operations). Questions regarding faculty workload will continue to be a topic of high importance and should be addressed as explicitly as possible in the handbook. Including assessment and program review as a part of the academic responsibility (instead of as service, as it is currently considered) and, therefore, criteria for academic performance evaluation, would elevate the importance of these activities.

Faculty have a good understanding that there are mandatory regulatory and administrative policies and then there are other academic policies, for which they have responsibility. Documentation of the decision-making processes for policy development are not made clear, nor are the actions to

implement approved policy. Systems should be put in place to document process and tracking of policies to assure compliance and maintain a record for changes in personnel.

Professional development for faculty currently consists of their attendance at a professional conference, usually at their request. Formalizing the process of providing for the professional growth of faculty and integrating it with the need for improved assessment, accreditation expertise and innovation in teaching and learning, and with their annual goals, would result in positive outcomes for both Menlo College and its individual faculty members.

SECTION III – OTHER TOPICS, AS APPROPRIATE

Not applicable.

SECTION IV – FINDINGS, COMMENDATIONS, AND RECOMMENDATIONS FROM THE TEAM REVIEW

Overall, the team observed some progress on each of the eight issues identified in the Commission Action Letter of July, 2016.

Commendations:

The team commends Menlo College for:

- Significant improvements made to campus facilities, especially including increasing capacity in the residence halls and major improvements made to residence hall lavatories. This commitment to improving the physical space is enhancing the living and learning experiences of students, which contributes to overall campus health.
- Turning cash positive through fundraising, the drawing down of cash reserves, and stabilization of enrollment.
- Its rebranding initiative. We especially commend the college for engaging students in efforts to develop a marketing plan through an innovative new course led by a trustee. Engaging students in real-world application of knowledge towards innovative solutions is a positive example of the mission in practice.
- Improved communication between administration and faculty has resulted in new levels of collaboration and trust, and we commend Menlo College for this.

Recommendations:

The team recommends that Menlo College:

- Continue to build capacity for institutional understanding to increase student retention and degree completion, including engaging in deeper analysis of student attrition data to look beyond most commonly identified causes, and developing solutions and plans to address those needs. (CFRs 2.7, 2.10, 4.1, 4.2, 4.3)

- Develop more realistic budgeting scenarios that are in line with peer institutions and market trends, and reflect resource allocations that are in alignment with strategic priorities. Leadership should work towards matching expenses with revenues and carefully examine the current resource allocations made to athletics and academics and determine the appropriate levels of funding. (CFR 2.1, 3.1)
- Build on the progress it sees in strategic planning but that greater effort be placed on alignment with Menlo's mission & vision. The plan should explicitly address target markets (e.g., student athletes, transfer students, diverse populations and business and psychology career focused students who have high potential and who are interested in the innovation economy). Management should highlight Menlo's differentiated offerings and competitive advantages. The plan should also include timelines for accomplishment of objectives, metrics that will allow the tracking of progress, and include clear definitions for successful accomplishment of the plan. (CFRs 3.4, 4.6)
- Continue building a culture of assessment but that provision be made for greater professional development, especially around assessment, for faculty, and that greater staff support be provided to advise and assist faculty with this work. (CFRs 2.4, 2.6, 2.9, 3.3)
- Examine the role and responsibilities of the Director of Institutional Effectiveness to determine capacity for completing both the institutional research and assessment functions of the college, as well as providing support for academic, co-curricular and administrative program review processes. Menlo needs to ensure sufficient support for academic and cocurricular program review, either through the Institutional Effectiveness position or through other highly trained resources; examine models for leadership and accountability for the program review process. (CFRs 2.2, 2.2a, 2.3, 2.4, 2.7, 2.10, 3.7, 4.1, 4.2, 4.3, 4.4, 4.5)
- Continue to update and edit the Faculty Handbook for accuracy and clarity of policy, procedure, and accountability through the Faculty Senate. Documentation and differentiation between Senate By-Laws and academic roles and responsibilities should be addressed as well as systems for tracking the policies and decisions made. (CFR 3.10)

APPENDICES (if applicable)

Not applicable.