

REPORT OF THE WSCUC TEAM
SPECIAL VISIT

To: William Jessup University

October 20 - 23, 2020

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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

Description of the Institution and Accreditation History

William Jessup University (WJU) is a private Christian liberal arts university founded in 1939 as San Jose Bible College, later known as San Jose Christian College. In 2003 the name was changed in honor of the founder and the following year the university relocated from San Jose to a 125 acre facility in Rocklin, California. The main campus includes an innovative re-design of the existing facility and significant expansion of classrooms, housing, and athletic accommodations. Additional education centers include a 12,000 square foot class A office complex in San Jose, near the college's previous site, with eight classrooms and eleven offices. A second center is scheduled to open fall 2020 in Elk Grove, California, at a new 32,000 square foot Community Center with three classrooms available for evening classes (this action was subsequently delayed due to COVID-19 issues). Three of the Special Visit team members had been on the main campus for a previous visit, but since this review took place virtually and it was not a focus of the Special Visit, team members did not visit any of the sites in person.

WJU's enrollment has grown by fifty percent in the past five years to over 1,800 students in traditional undergraduate, adult degree completion, and graduate programs. The university offers eight master's degrees, twenty-five undergraduate majors for bachelor's degrees, three associate degrees, and one certificate program. Substantive change approval was given by WSCUC to begin a Bachelor of Science in nursing degree in 2021. Thirteen programs are offered in a fully online modality.

The university mission statement is: *"In partnership with the Church, the purpose of William Jessup University is to educate transformational leaders for the glory of God."* Church and civic engagement is a major emphasis as expressed in community covenants and values such as the vision statement: *"The William Jessup University vision is that our graduates will be*

transformed and will help redeem world culture by providing notable servant leadership; by enriching family, church and community life; and by serving with distinction in their chosen career.”

WSCUC accreditation was achieved in 2002 as San Jose Christian College. The next cycle of accreditation was completed under the former WSCUC Handbook of Accreditation with a Capacity and Preparatory Review in 2007 and an Educational Effectiveness Review in 2009, resulting in reaffirmation and the next visit scheduled for 2017. A Special Visit took place in October 2012 after which the Commission requested a Progress Report due March 1, 2014 to describe the process for addressing balloon loan payments and how those costs were to be covered.

Following the 2017 Accreditation Visit, the Commission acted in February 2018 to reaffirm WJU’s accreditation for a period of six years. WJU was to prepare a Progress Report by November 1, 2019 to address debt refinancing, the reduction of the principal on existing loans, and development of a contingency plan to accommodate shortfalls in projected enrollment and/or fundraising. The report was submitted to WSCUC and accepted as meeting this expectation.

The action letter also called for a Special Visit in fall 2020 to address the general areas of assessment, program review, student success, strategic planning, organizational culture, and financial sustainability. Specifically, seven recommendations were made, which became the focus of the Special Visit and subsequent report:

1. An infrastructure for the ongoing assessment of co-curricular programs. (CFRs 2.6, 2.7, 2.10, 2.11, and 2.13)
2. An assessment of the impact of rapid growth and change on the campus culture, personnel, and facilities to ensure appropriate levels of support are in place along with

processes to communicate effectively with the campus community. (CFRs 3.5, 4.6, and 4.7)

3. Transparent and inclusive approaches to decision-making and policy-development through a published and implemented shared governance model based on best practices in higher education. (CFRs 3.1, 3.7, and 3.10)
4. The establishment of a standing committee, with faculty and other appropriate representation, to ensure a continued focus on student success and to develop a comprehensive retention plan based on institutional research data. (CFR 2.10)
5. Continued development of annual program assessment to include the use of technological resources to manage and analyze data and the disaggregation of data to track and improve student success; optimize the connection between program review and strategic planning. (CFRs 2.4, 2.6, 2.7, 2.10, 2.11, 4.4, and 4.6)
6. Aggressive efforts to refinance existing debt into a fully amortized loan and to incorporate into the annual budget operating surpluses dedicated to reduction of principal. Financial planning will also need to include a contingency plan in the event there is a major shortfall in enrollment and/or fundraising. (CFR 3.4)
7. A strategic planning process enhanced to include broader systematic input from stakeholders, greater reliance on data and research, and an effective means of communicating progress to the campus community. (CFRs 4.5 and 4.6)

There has been some turnover in senior administrative positions and restructuring of the organizational functions since the last visit. The team explored the impact of these transitions and determined they have had an overall positive influence on the operation of the university.

Description of Team's Review Process

The team prepared for the Special Visit by reviewing the institution's August 2020 Institutional Report and examining the data and supporting materials. All information was readily available in digital format by the predetermined timeline and organized in a fashion that included links from the Institutional Report to the online documents. The team requested additional information on key topics that was promptly provided by the university. This included over twenty-five documents related to finances, assessment, strategic planning, and survey data. The confidential email account address was distributed to the campus community in advance of the visit and responses were reviewed by the team for relevant information.

Due to the COVID-19 pandemic, the visit took place virtually. All team members participated in WSCUC training to conduct reviews in this format and the schedule was adjusted accordingly. The process went smoothly and resulted in sufficient interaction with WJU faculty, administration, and staff. The team met virtually to discuss evidence and draw conclusions regarding their respective issues and found this approach satisfactory.

Virtual interviews took place with the president and senior administrators, faculty, staff, the WSCUC Review Steering Committee, Strategic Planning Task Force, deans, Assessment and Educational Effectiveness Committee, Diversity Task Force, and the Retention Committee. While in-person meetings are more conducive to interaction, the protocols established for the virtual meetings did provide opportunities for candid questions and discussions.

Quality and Rigor of the Institution's Report and Supporting Evidence

WJU's forty-page report was prepared in a readable format and written with a very positive tone highlighting many accomplishments over the past five years. The report narrative contained some background information that was not directly related to the seven issues under

consideration, but it was not a distraction from key issues and served to provide context. It was organized according to the WSCUC recommendations and included appendices of hyper-linked attachments and a complete list of those who had contributed to the content and preparation of the report. Over fifty individuals from eight functional areas of the university were involved and acknowledged the value of the approach that integrated assignments into their normal workflow. The team commended WJU for the preparation of a thorough report, for prompt response to all requests, and for conducting a well-organized virtual visit with broad community participation.

Each recommendation contained in the Commission Action Letter was addressed in the WJU report by first providing an executive summary of the university's understanding of the issue followed by actions that have been taken. This was supported by describing evidence that demonstrated improvement in respective areas and a section on work in progress. This model facilitated efficient work by the evaluation team.

The university's self-assessment of progress on the seven recommendations determined two had been completed, with substantial progress on the remaining five. The evaluation team explored this conclusion and acknowledged WJU is on a good trajectory to full resolution of the recommendations, with some work remaining in key areas.

SECTION II – TEAM’S EVALUATION OF ISSUES UNDER THE STANDARDS

Financial Stability

March 2018 Action Letter Recommendations:

Aggressive efforts to refinance existing debt into a fully amortized loan and to incorporate into the annual budget operating surpluses dedicated to reduction of principal. Financial planning will also need to include a contingency plan in the event there is a major shortfall in enrollment and/or fundraising. (CFR 3.4)

WJU has continued to grow net tuition and fee revenues since the last WSCUC visit. A summary of the net tuition and fee revenues below, taken from the school’s Statement of Activities document, show year over year growth as follows:

June 30, 2017	\$20,141,635
June 30, 2018	\$22,676,076
June 30, 2019	\$25,742,637
June 30, 2020	\$25,934,319

While the spread between the 2019 and 2020 net tuition and fee revenues was minimal, due largely to the COVID-19 pandemic, the university was still encouraged by their overall performance. WJU also grew its auxiliary service revenues during this same period in similar fashion. In addition to the overall revenue growth, the university also diversified its tuition revenue streams into additional higher-margin products, which is hoped to ultimately assist in subsidizing the growth of traditional undergraduate enrollment. (CFR 3.4)

The increasing revenues are a byproduct of the growing enrollments, which are also shown below, representing the respective spring headcounts through 2020:

Spring 2017 Headcount	1,344
Spring 2018 Headcount	1,542
Spring 2019 Headcount	1,855
Spring 2020 Headcount	1,893

While overall revenues have been increasing, during the 2018/2019 year WJU had a deficit in net income/net assets, which was primarily due to a shortfall in budgeted gifts and

contributions from the Advancement area. This resulted in a net income/net assets deficit of <\$1.13M>. Additionally, WJU ended 2019/2020 with \$9.3M of net income, of which \$9.4M was from a land donation gift. Without this donation, WJU would have ended the year with a loss of approximately <\$85K>. This loss came primarily as a result of the COVID-19 pandemic and the reduction of revenues associated with it. The current year (2020/2021) budget forecast for net income/net assets provided by WJU shows there was a reduction from \$4.9M to \$3.8M due to the COVID-19 pandemic. A summary of projected net income/net assets for the following three years is as follows:

June 30, 2022	\$2,447,028
June 30, 2023	\$4,232,503
June 30, 2024	\$6,019,836

WJU remains cautiously optimistic that these estimates can still be attained based upon their enrollment experience thus far with COVID-19. (CFR 3.4)

WJU continued to meet the Federal Financial Aid Composite Score through its most recent year-end 6/30/20, with a score of 2.5. The school consistently maintained its score at 1.5 or higher since the last visit. WJU reported there were no significant backlogs related to deferred maintenance projects, and that from a facilities perspective, they remained current on their refurbishing schedule and Information Technology replacement needs. Cost of living adjustments (COLA) have been consistently provided in January to both faculty and staff since the last WSCUC visit. WJU has also recently completed an economic efficiency study with BKD Certified Public Accounting, the results of which are expected to further assist in guiding the university's resource planning efforts going forward. (CFR 3.4)

WJU was able to successfully refinance approximately \$69.3 million of existing long term debt, which consisted of three bank loans with interest rates ranging from 5% to 6.5%, to tax-exempt bonds with a true interest cost of 4.5%, fully amortizing over a 30 year period. This

was a very large and complex undertaking for the university, but was key to their financial viability in that WJU is now paying down both principal and interest, whereas previously only interest payments were being made on the outstanding debt. While this increased the university's overall monthly debt payments, WJU continued to pay its obligations to all of its vendors, within the agreed upon terms, without the need of their established line of credit. (CFR 3.4)

Based upon the recommendation by WSCUC that a contingency plan be put in place in the event of an enrollment or fundraising shortfall, the bonds were structured with an innovative covenant package, that provided for the continued growth of the university along with flexibility should there be a shortfall in enrollment or fundraising. A unique provision allowed a cure period and use of an independent consultant to make recommendations as to a revision of the rates, fees, and charges of the university or the methods of operation of the university to increase the debt service coverage ratio and days cash on hand for subsequent fiscal years to the level required by the covenants. If the university complies in all material respects with the reasonable recommendations of the independent consultant in respect to said rates, fees, charges, and methods of operation or collection, the university will be deemed to have complied with the debt service coverage covenants. Due to the high demand from the public for the WJU bonds, the university was also able to lower the anticipated interest rate on the bond significantly relative to the initial offering. To date, the university has met or exceeded the new debt covenants for both days cash on hand and debt service coverage. WJU, as part of the bond agreement, established a "debt service fund" in the amount of \$4.7M, that was funded as part of the initial bond issuance, to ensure full and timely payments. This amount must be maintained throughout the term of the bonds in order to meet the covenant requirements. WJU's Statement of Cash Flow forecast shows they will have sufficient cash available at fiscal yearend 2021 to cover the required bond

covenant calculations. The combined interest and principal payments for the bonds have been fully included in the university's annual budget plans. (CFR 3.4)

WJU management, in its Institutional Report, stated the university would build cash reserves to a prudent level and then apply operating surpluses between cash reserves, debt reduction, and new program opportunities. When the WJU chief financial officer (CFO) and president were asked about what a "prudent" level of cash reserve would look like, it was stated that having one year's worth of the bond debt service payments on hand in a contingency fund (principal and interest) would be ideal. Having sufficient cash on hand to meet the covenants will remain a priority for WJU each year, in addition to creating this additional cash reserve/contingency fund. Therefore, the team recommended that WJU create a prudent contingency fund, based upon WJU's expressed desire, of a full year's bond principal and interest debt service payments.

Thus far, the year over year enrollment growth has sustained the university, and this will need to continue in the outlying years to meet the large scheduled debt service payments and the required bond covenants. The expected sale by WJU of a recent land gift donation is hoped to bring in a cash windfall of approximately \$9M that could be used to immediately establish this cash contingency fund. Cash available to spend for strategic purposes, the additional debt service load the university is carrying, and the potential for unexpected enrollment or advancement shortfalls, continued to make this additional contingency fund a critical area of importance as it related to the financial sustainability of WJU. (CFR 3.4)

COVID-19 impacts on fiscal performance have been and are actively being managed at WJU. Housing projections for FY21 have been reduced by 10%, a financial impact of \$323,940 (8.7%) reduction in forecasted housing revenue. Enrollment projections, largely undergraduate, have been adjusted downward by approximately 50 students at the time of writing this report.

WJU has also stopped the employer retirement contributions to all its faculty and staff for fiscal year 21. The FY21 budget was presented to the Audit Committee of the Board of Trustees on June 22, 2020. They allowed WJU to delay final presentation until August to allow more time to assess uncertainties related to enrollment. WJU has also received \$4.6M of Cares Act funding provided by the federal government in response to the pandemic, of which approximately \$3.9M was available for direct university purposes/expenses related to effects of COVID-19. As a result of these overall actions taken and the Cares Act funding, the outlook for the current fiscal year continued to remain positive with revised budgeted expectations of net income at \$3.9M.

Assessment: Co-curricular and Program

March 2018 Action Letter Recommendations:

An infrastructure for the ongoing assessment of co-curricular programs. (CFRs 2.6, 2.7, 2.10, 2.11, and 2.13)

Continued development of annual program assessment to include the use of technological resources to manage and analyze data and the disaggregation of data to track and improve student success; optimize the connection between program review and strategic planning. (CFRs 2.4, 2.6, 2.7, 2.10, 2.11, 4.4, and 4.6)

An infrastructure for co-curricular assessment, based upon the academic assessment model, was created and implemented across the institution. The co-curricular assessment reports demonstrated a wide variety of efforts to address the same university goal: *Communicate effectively across cultures*. In all instances, programs noted that data collection and analysis was impacted by COVID-19 and the transition to remote learning, and yet each report effectively demonstrated student achievement. Data collection and analysis was unique to specific co-curricular areas and ranged from rubric data, resume reviews, participation in activities, self-observation and perception, to anecdotal reporting. This assessment effort in co-curricular areas complemented and supported the academic assessment process. The team commended WJU for the development and implementation of continuous assessment processes used in co-curricular

areas, linked to university outcomes, with evidence of data collection. WJU noted the next stage in the development of co-curricular assessment should concentrate on engaging in professional development in order to refine processes and capitalize on multiple and disaggregated measures of student engagement.

WJU has taken steps to further develop the process for annual program assessment. The Educational Effectiveness Committee (EEC) was restructured to include faculty representation from all divisions to serve as assessment coordinators. EEC accomplishments included modifying the annual report process, leading a faculty development opportunity in university-level assessment, and evaluating assessment technologies to further support the university. Evidence of these efforts was seen in the examples of two school/division assessment reports, which were shared through the lens of the WSCUC Capstone Rubric. Improvement was demonstrated through lines of inquiry that surfaced relevant results used to determine valid and reliable conclusions. A new data collection software, Campus Labs, was determined to be the choice technology for assessment purposes and efforts to see the fruits of this labor are scheduled for June 2021. Interviews with leadership, faculty, and the EEC revealed the need for a more mature approach to disaggregating student learning outcomes data to better serve the needs of all students, which was the next step in refining annual assessment processes. The team recommended WJU disaggregate student learning outcomes data across academic and co-curricular programs to better identify and serve unique student needs.

The current process created for program review included "analysis of the program's learning outcomes, assessment studies, and results" (WJU Institutional Report, p. 28). Program review samples demonstrated a range of organizational approaches, from primarily narrative or anecdotal learning outcome results to formal quantitative forms of learning outcome data. The differentiation allowed each program the autonomy to utilize the review in a way that best suited

their "burning questions." Program review results were analyzed by department or school stakeholders. Deans used results to either create or support a three-year strategic plan cycle for the school that was approved by the Chief Academic Officer. Evidence of budgetary needs were represented in program reviews and documented on a form that summarized the action plan. This practice was seen with all of the program reviews but not all were consistent in completing the area for budgetary needs. Faculty members were candid in their responses to the lack of communication regarding the budgetary needs that rise to the surface of program reviews. It is anticipated that Campus Labs and the analysis of further detailed financial accounting reports may better support deans in connection and communication between program review and strategic planning.

Strategic Planning

March 2018 Action Letter Recommendation:

A strategic planning process enhanced to include broader systematic input from stakeholders, greater reliance on data and research, and an effective means of communicating progress to the campus community. (CFR 4.5 and 4.6)

Documentary evidence reviewed related to WJU's strategic plan included the current strategic plan and tracking document, sample workflow and project dashboards intended for implementation with the subsequent strategic plan, new program development guidelines, a project request spreadsheet with requests linked to strategic initiatives, the Institutional Report, and an economic impact brief.

WJU's chief operating officer and vice president for educational effectiveness led regular 2016-17 Strategic Plan updates along with biannual executive reviews. It was reported employees received these updates at monthly meetings and had ongoing viewing access to a planning document that included identifying information and lead contacts, as well as select entries about related costs, duration, and status. Although the Strategic Planning Committee

included campus wide representation and provided open document access opportunities, and even with academic representation on the Strategic Plan Task Force, many faculty members candidly attested to feeling outside of access, planning, information, and communication loops. (CFR 4.5)

During campus meetings, one budget manager described links between budget proposals and departmental strategic plans, suggesting that departmental plans ultimately may be integrated within the university plan. However, budget managers in general were unable to articulate any pathway from proposal requests to the university strategic plan or from strategic plan allocation decisions back to their requests. Currently, explicit links between budgets and the university level strategic plan did not appear to either exist or be systematized, with low campus-wide understanding about whether there is any alignment between requests, approvals, and strategic initiatives. Therefore, it is recommended that WJU create and maintain clearly identifiable and accessible data streams between university strategic plan priorities, budgetary requests, resources, and allocations. (CFRs 4.6 and 3.4)

Although development of the subsequent 2021-2023 Strategic Plan was interrupted by COVID-19, the 2016-2021 Strategic Plan continued to receive WJU attention in areas related to updates, communication, and operationalizing the contents, with improvements reported particularly in the areas of debt resolution, new program development, and assessing campus culture. As reported, approximately half of the current plan's stated goals have been completed, six were removed, and eighteen added, as testimony to the document's viability. (CFRs 4.5, 4.6)

New program development, one of WJU's current and effective strategic initiatives, was prescribed to follow a campus wide, detailed, chronological path, as evidenced by a four-quarter sequence, which included multiple stakeholder approval steps. In the future, project management

dashboards scheduled for campus training and implementation, are slated to automatically alert task-specific stakeholders regarding each initiative's status as progress unfolds. (CFR 4.6)

WJU envisioned the new strategic plan to be more data informed than the 2016-2021 version. Accordingly, outside guidance had been employed to adopt data metrics, which will inform future strategic plan decision making. Also, the addition of an enrollment customer relationship management system and engagement with an educational accounting and consultancy firm contributed to opportunities for data informed decision making. Another data source included a spring 2020 economic impact report. An additional staff member was hired to integrate the various university data sources within a software platform in order to facilitate data entry, tracking, analysis, and subsequent action. (CFR 4.6)

Greater engagement of task forces and focus groups was also envisioned for the 2021-2023 plan, which was being built on a three-year rolling structure to serve agility. New dashboards had been adopted for the 2021-2023 Strategic Plan implementation, intended for twice monthly reviews by an associated task force. The sample dashboards identified assigned budgetary amounts among other data. A finalized plan was slated for adoption in July 2021 and will be revealed to the community in August 2021, followed by quarterly reporting updates. (CFRs 4.5 and 4.6)

Student Success and Retention

March 2018 Action Letter Recommendation:

The establishment of a standing committee, with faculty and other appropriate representation, to ensure a continued focus on student success and to develop a comprehensive retention plan based on institutional research data. (CFR 2.10)

Based on a review of the evidence including the update provided in the Institutional Report, student retention and graduation reports, minutes from Retention Committee meetings, and interviews, WJU made meaningful progress on this recommendation with the formation of

an effective retention committee, while continued work is still needed to complete a retention plan. In spring 2018, WJU established a university-wide retention committee, chaired by the associate vice president of student success, which included personnel from athletics, student life, admissions, financial aid, registrar, student success center, institutional research, and faculty. The committee met monthly and reported to the vice president of academic affairs. The committee had broad representation and was populated with members who possess the authority to act within their respective areas. The team commended WJU for the formation of a retention committee empowered by virtue of their respective positions to make changes to improve student success.

The committee began by discussing its purpose, identifying areas of inquiry and relevant institutional data, and researching best practices for student success and retention. The committee had conducted a limited review of institutional data including courses with a high number of D, F, and W grades; reasons for student withdrawals; remediation programs and courses; and reasons for holds on registration. Its analysis of non-returning students revealed the institution needed staff and systems to more effectively pull data and produce meaningful reports. In response, the institution acquired and is beginning to implement the TargetX retention software, which will identify at-risk students and provide means for communicating early alerts.

When requested, the institution provided retention and graduation rates for recent cohorts. WJU's five-year average year-one to year-two retention rate for first-time freshmen was 76%, although the most recent cohort showed a decline to 69%. Similarly, the 6-year graduation rate average was 60.6% with a decline to 52% for the 2014 cohort. Data was disaggregated according to Integrated Postsecondary Education Data system (IPEDS) specifications, with no further disaggregation applicable to WJU's institutional context. In interviews, committee members verified additional disaggregation of data including Pell-eligible, probation, and

transfer grade point average. Further focused analysis of the satisfaction and success of various student populations will benefit the committee's efforts. (CFR 4.2)

WJU provided evidence of changes made to improve student success. Based on the initial work of the committee, the institution had acted to reduce the number of holds preventing students from registering, forwarded concerns about courses with high D, F, or W grades to deans and chairs, and clarified admissions policy and practices for students with probationary acceptance. In response to the recent decline in retention rates and student survey responses showing dissatisfaction with some processes, WJU moved to a student success coach model for student support and advising. This included a recent hire who was overseeing the program and training the success coaches. (CFR 2.13)

WJU has yet to create a comprehensive retention plan. The Institutional Report pointed to limitations in systems and staffing as reasons for the delay. In interviews, committee members further explained that they determined the best approach was to first clearly define its purpose, identify institutional concerns, and lay the groundwork for the plan through the efforts described above. The committee also saw the importance of aligning the retention plan with the new strategic plan, scheduled for completion in July 2021. The committee expressed confidence that a retention plan will be completed in fall 2021. The team recommended that WJU create and maintain a comprehensive, data-driven, written retention plan identifying retention and completion goals and strategies to achieve those goals. (CFR 2.10)

Policy Development and Campus Culture

March 2018 Action Letter Recommendations:

An assessment of the impact of rapid growth and change on the campus culture, personnel, and facilities to ensure appropriate levels of support are in place along with processes to communicate effectively with the campus community. (CFRs 3.5, 4.6, and 4.7)

Transparent and inclusive approaches to decision-making and policy-development through a published and implemented shared governance model based on best practices in higher education. (CFRs 3.1, 3.7, and 3.10)

The fall 2017 Accreditation Visit revealed concerns expressed by faculty and staff regarding organizational culture. While WJU had been experiencing much success in enrollment growth, addition of new academic programs, fundraising, and expansion of facilities, these changes had apparently created some frustration within the campus community. Out of these findings came the two interrelated recommendations noted above.

Change, even when positive, can be unsettling and while individuals were pleased with the progress WJU made, they conveyed they would like to have a higher level of involvement in decision making and better communication. With the growth of new programs and other initiatives, not enough attention had been given to how people were being impacted by ongoing progress. In an interview, the president acknowledged there had existed an atmosphere of unsettledness or disequilibrium that called for attention to clarity, community, and change. WJU responded with several initiatives.

- Regularly scheduled all-employee meetings with opportunities for questions and answers.
- An executive team reorganization to flatten the organization and improve communication.
- Completion of a campus climate survey with 70% participation. Among the results, the survey revealed gaps in communication between departments.
- An automated ticketing system for cross-functional support services that facilitated more than 8,000 requests in twelve months.
- Investment in a project management model of operation, including tracking software, training forty departmental leaders, and hiring a project management professional.

The impact of these initiatives was a topic of discussion with WJU faculty and staff during interviews. Campus leaders identified the heart of these challenges as being change management.

The university conducted a review of the existing administrative structure and explored operational models at other higher education institutions. The conclusion reached was to design an approach that best suited their circumstances using a system of four teams: executive, revenue, educational, and operational. For example, the president assembled an academic leadership team consisting of the chief academic officer, six deans who lead the institution's schools, heads of co-curricular, academic and faculty support units, and the chair of the academic council. This group interacted with the president on a regular basis and brought collective faculty and academic staff concerns before the team, where priorities were identified and affirmed for future action. In this way, the president solicited and heard the concerns of the faculty about curriculum development, student affairs, and how best to identify and implement strategies around student success.

The faculty personnel council had recently been reconfigured to include core faculty, administrative faculty, and adjunct faculty. This reconstitution allowed WJU to become more responsive to faculty needs. The council had a direct line to the president with the opportunity to meet with the president several times a year to share faculty concerns around salary, benefits, sabbaticals, professional development, and other areas, which are critical to faculty quality of life and performance.

Personnel changes at the senior leadership level were also a factor in improving communication and participation in decision-making. Respondents expressed dramatic improvement over the past year in the opportunity to provide input on new developments. The team commended WJU for improving campus communication and participation in decision-

making through the administration of a workplace survey, implementation of a project management system, and strategic reorganization of administrative teams. These efforts had contributed to a more positive atmosphere of community involvement and understanding of change that occurs.

Faculty participation in decisions that have direct impact on academic programs is essential to healthy institutional growth, particularly during times of aggressive expansion. WJU did not have a well-designed process for this level of engagement. A comprehensive policy of shared governance had been prepared with plans to publish it in fall 2020 after reorganization is complete, titles are confirmed, and the board has conducted a final review. The policy addressed philosophical constructs and clearly identified lines of governance authority and areas of responsibility. Interviews with the faculty led the team to conclude there was little knowledge among the general faculty population of how the shared governance policy had been developed, when it was to be publicly announced, or if it was being followed. However, this did not appear to be a point of dissatisfaction and feedback indicated a high level of faculty morale with the current state of involvement.

The team inquired why it had taken over two years for this to be addressed and was still not implemented. Two factors played a key role in this delay. First, was turnover in academic administration that created a brief gap in attention being given to this recommendation. Secondly, the COVID-19 pandemic interfered with meetings of focus groups and meetings to finalize the policy. It was currently scheduled for final approval by the board of trustees. The visiting team recommended WJU take steps to achieve pervasive awareness among the faculty of the development of the shared governance policy; and begin policy implementation. (CFRs 3.2 and 3.7)

SECTION III – FINDINGS, COMMENDATIONS, AND RECOMMENDATIONS

Commendations

The team commended the university for:

1. The preparation of a thorough report, for prompt response to all requests, and for conducting a well-organized virtual visit with broad community participation.
2. The development and implementation of continuous assessment processes used in co-curricular areas, linked to university outcomes, with evidence of data collection.
3. Improving campus communication and participation in decision-making through the administration of a workplace survey, implementation of a project management system, and strategic reorganization of administrative teams.
4. The formation of a retention committee empowered by virtue of their respective positions to make changes to improve student success.
5. The successful refinancing of the three previous bank loans into a self amortizing single tax exempt bond issuance.

Recommendations

The team recommended the university:

1. Create and maintain clearly identifiable and accessible data streams between university strategic plan priorities, budgetary requests, resources, and allocations. (CFRs 3.4 and 4.6)
2. Disaggregate student learning outcomes data across academic and cocurricular programs to better identify and serve unique student needs. (CFRs 2.6, 2.7, 2.10, and 2.11)
3. Create and maintain a comprehensive, data-driven, written retention plan identifying retention and completion goals and strategies to achieve those goals. (CFR 2.10)
4. Achieve pervasive awareness among the faculty of the development of the shared governance policy; and begin policy implementation. (CFRs 3.2 and 3.7)
5. Create a prudent contingency fund, based upon WJU's expressed desire, of a full year's bond principal and interest debt service payments. (CFR 3.4)