REPORT OF THE WSCUC TEAM
SPECIAL VISIT
To

CALIFORNIA INSTITUTE OF INTEGRAL STUDIES

Date of Visit:
APRIL 15-17, 2020

Team Chair:
Anna DiStefano, Provost Emerita, Fielding Graduate University
Team Assistant Chair:
Ariane Schauer, Provost, Marymount California University
Team Members:
Gilbert Newman, VP for Academic Affairs, The Wright Institute
Doug Renner, Associate Vice Chancellor/Controller, Brandman University
WSCUC Staff Liaison:
Mark Goor, Vice President, WSCUC

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.

REPORT OF THE WSCUC TEAM SPECIAL VISIT To

CALIFORNIA INSTITUTE OF INTEGRAL STUDIES

TABLE OF CONTENTS

SECTION I – OVERVIEW AND CONTEXT

A. Description of the Institution, its Accreditation History, as Relevant, and the Visit
B. Description of Team's Review Process
C. Institution's Special Visit Report: Quality and Rigor of the Report and Supporting Evidence

SECTION II – TEAMS'S EVALUATION OF ISSUES UNDER THE STANDARDS

SECTION III – OTHER TOPIC: COVID-19 RESPONSE

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

SECTION I – OVERVIEW AND CONTEXT

A. Description of the Institution, its Accreditation History, as Relevant, and the Visit

Founded in San Francisco in 1968 as the California Institute of Asian Studies (CIAS), the California Institute of Integral Studies (CIIS) changed its name in 1980 to better reflect the integral philosophy that is central to its educational approach. CIIS offers innovative degree and non-degree programs that explore multiple aspects of the human experience. Programs combine academic content with a learning environment designed to be personally and socially transformative. CIIS is known for its counseling and clinical psychology programs, its merging of philosophical traditions, its integration of eastern and western world views, its dedication to multiple ways of learning and knowing, and its recognition and affirmation of spirituality. An orientation to healing is found throughout the university, in programs directed towards physical and mental health and wellness, and in a strong commitment to sustainability, ecology, and social justice. Originally a graduate school, in 1993 the university extended its academic programs to include undergraduate education, introducing a bachelor's degree completion program. In July 2015, the American College of Traditional Chinese Medicine (ACTCM), founded in 1980, merged with CIIS.

CIIS owns its facilities at 1453 Mission Street in the mid-Market area of San Francisco. The central building is supplemented by a leased site in nearby Potrero Hill (455 Arkansas Street), the primary home of ACTCM. Acupuncture is offered in a public clinic at the Arkansas campus and twice a week at the Mission campus. Five sliding-fee, community counseling centers are in various leased locations throughout San Francisco, with a sixth free clinic located at several San Francisco Housing Authority sites.

CIIS currently offers thirty degree programs or concentrations: two bachelor's degrees, fifteen master's degrees; nine PhD degrees, and four professional doctoral degrees. Programs are offered in face-to-face, hybrid, and online modalities. Online programs typically include a face-to-face component at the start of each semester. All classes have their own online space in Canvas. Four programs employ a cohort model: Bachelor of Arts, Bachelor of Science, Master of Arts in Counseling Psychology (all five concentrations), and PhD in Human Sexuality. Fall 2019 enrollment was 1,511 students, 70 of whom were at the undergraduate level and 1,441 at the graduate level. CIIS has a vibrant Public Programs department, offering events, workshops, and continuing education at the Mission Street campus and in various venues in the Bay Area.

CIIS has been continuously accredited by WSCUC since 1981. ACTCM at CIIS is additionally accredited by the Accreditation Commission for Acupuncture and Oriental Medicine (ACAOM), with accreditation of its Master of Science of Traditional Chinese Medicine since 1991 and its Doctor of Acupuncture and Oriental Medicine since 2012. ACAOM granted ACTCM permission to offer the Doctor of Acupuncture and Chinese Medicine in 2014. These two doctoral degrees were approved by WSCUC at the time of the merger, and a related distance program designed for practitioners, the Transitional Doctor of Acupuncture and Chinese Medicine, was approved by WSCUC in December 2019.

CIIS had its most recent full WSCUC accreditation visit in November 2016. This was during a time of considerable transition and turmoil for CIIS, as the university was addressing a substantial projected deficit and the president was placed on sabbatical and the provost appointed as interim president just prior to the visit. The Commission placed the university on Warning due to concerns about financial

stability, leadership, and strategic planning. A report and special visit were required with a focus on financial strength and sustainability, strategic planning, and leadership. The Special Visit took place in February 2018. In June 2018, the Commission acted to remove the Warning status and issued a Notice of Concern. A progress report on marketing and enrollment was submitted as requested in February 2019.

The current Special Visit Institutional Report addressed the seven issues identified as Recommendations in the Commission letter of July 20, 2018:

- Issue 1 - Complete the Board review of committee mandates and bylaws and revise mandates as necessary to make responsibilities more clear. (CFR 3.9)
- Issue 2 - Develop a Board approved succession plan that clearly articulates short-term and long-term actions in the event of the vacancy of the office of the president.
- Issue 3 - Employ the use of the annual federal Composite Financial Index score to gauge the financial health of the institution. (CFR 3.4)
- Issue 4 - Determine which of the several versions of the strategic plan will guide the work of the institution. Identify principle parties responsible for implementing and monitoring the strategic plan. Tie the strategic plan to the financial management of the institution. (CFR 3.4, 4.6)
- Issue 5 - Establish clear and consistent metrics and forms of evidence regarding progress toward meeting strategic plan objectives across the various units. (CFR 4.3)
- Issue 6 - Integrate the Diversity and Inclusion Strategic Plan into the Institution's strategic plan. (CFR 4.6)
- Issue 7 - Establish and emphasize the central role of faculty as integral partners in the development and implementation of the strategic plan, in the development of new program initiatives, and in the evaluation and revision of current programs based on robust assessment data. (CFRs 3.7, 3.10)

B. Description of Team's Review Process

The WSCUC Special Visit occurred a month into California's state-wide stay-at-home order in response to the global Covid-19 coronavirus pandemic. The visit was therefore conducted virtually through video conferencing.

The team had reviewed documents provided by the institution and held a pre-visit video-conference call on March 27, 2020 to discuss initial impressions and plan the visit. The team convened again virtually on April 15th. Documents reviewed included the Institutional Report, the 2018-21 Strategic Plan, dashboard data, financial reports, admission funnel data, organizational chart, Board minutes, CVs of new members of the leadership team, and prior WSCUC Team Reports and Action Letters.

The April 16-17, 2020 visit included video conferences with the President; the President's Cabinet; the Board of Trustees; the CFO and finance office staff; the Admissions Director and the Marketing and Communications Director; the Faculty Executive Committee and the Curriculum and Academic Review Committee; the VP for Advancement; the Center for Psychedelic Therapies and Research Director; the Public Programs Director; the Office of Diversity and Inclusion Director; the Dean of Students; the Director of Online Learning; the Library Director; the Director of the Center for Writing and Scholarship; and the Institutional Technology Liaison and ERP implementation project manager who also serves as the ALO.

CIIS trustees, faculty and staff showed good participation in the meetings and the team found them to be forthcoming and informative. In spite of the new virtual visit format, the team recognized and was impressed by a palpable sense of community and constructive collaboration in a challenging period, deep institutional pride, and meaningful progress in response to prior WSCUC action and recommendations.

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

The Institutional Report was submitted in a timely manner on February 6, 2020. Board-related materials were uploaded at the end of that month. Up-to-date financial materials were not available until the beginning of April due to a transition to a new financial auditing firm. During the visit itself, additional materials were made available about the presidential search process and firm contract, the Integral Futures Retreat, and the CV's of key staff who had joined the institution in the last year. In sum, the report was well-written and addressed most of the issues in the Commission letter; evidence in support of the report was adequate and supplemented as requested and necessary by the provision of additional materials, including some documents provided close to or during the visit.

SECTION II – TEAMS'S EVALUATION OF ISSUES UNDER THE STANDARDS

A. ***Issue 1 - Complete the Board review of committee mandates and bylaws and revise mandates as necessary to make responsibilities more clear.*** (CFR 3.9)
Issue 2 - Develop a Board approved succession plan that clearly articulates short-term and long-term actions in the event of the vacancy of the office of the president. (CFR 3.9)

At the time of the Special Visit in 2018, the team was impressed with the commitment to action of standing Board members and for the addition of new members with expertise and energy for the work ahead. At the same time, the Board itself acknowledged the need to review and update its bylaws and to clarify committee responsibilities; the team agreed. Furthermore, because of the relatively short-term and rolling renewal nature of the president's contract, that SV team recommended that the board develop a succession plan that clearly articulates short-term and long-term actions in the event of the vacancy of the office of the president (CFR 3.9.)

The institutional report for this Special Visit was silent on both of these issues. It seems that CIIS believed that they were to address Action items 1a., b., and c. in the Commission letter of July20, 2018, rather than the seven Recommendations contained in that letter. Before the visit, the team requested Board documents about these matters, e.g., by-laws, committee charges, and meeting minutes. Upon review of these written documents, it became clear to the team that CIIS had indeed attended fully to all these issues. Additionally, the team's meeting with the Board during the visit demonstrated a Board that was fully engaged and led at the Board and committee level by strong and well-informed members. Onboarding and evaluation of Board members have received renewed attention, and there was mention of adding an exit interview process for members leaving the Board. The Board is making use of the Balanced Scorecard to assess its strengths and needs. The process for searching for a new president in anticipation of the current president's retirement in Summer 2021 is underway. A search firm has been retained, and the profile for search committee members has been determined.

One thing that remains informal is the succession plan for key leaders (e.g., the President and the Provost) during occasions of short-term or long-term absences. The President shared her knowledge of the plan orally in the interview with the team. Therefore, the team recommends that CIIS *formalize processes for succession planning for short-term and longer-term vacancies/gaps in senior leadership positions. CFR 3.9*

B. ***Issue 3 - Employ the use of the annual federal Composite Financial Index score to gauge the financial health of the institution.*** (CFR 3.4)

The use of the Composite Financial Index (CFI) score has been incorporated into CIIS's reporting structure and is now used in conjunction with their newly created "Strategic Dashboard" to assist in tracking and assessing fiscal performance. The results of the CFI score, along with the other dashboard results, are presented to the President's Cabinet quarterly, and to the Board of Directors at each of the three meetings held during the fiscal year. Documentation provided by CIIS shows that for the past three years the CFI score has been calculated, with improvements in the overall score from a 1.2 in 2017, to a 2.70 recorded in 2019.

C. ***Issue 4 - Determine which of the several versions of the strategic plan will guide the work of the institution. Identify principle parties responsible for implementing and monitoring the strategic plan. Tie the strategic plan to the financial management of the institution.*** (CFR 3.4, 4.6)

CIIS has identified and created a new strategic plan. Taken from the "Special Visit Institutional Report"; "CIIS now has a unified strategic plan, with goals set through the 2020-2021 academic year. This plan builds upon and clarifies the plan created in 2017, which in turn evolved from and superseded a comprehensive 5-year plan that had been developed in 2014 for the 2015-20 period." "The revised plan is narrower in focus, tighter in timeline, and more detailed in identifying persons or offices responsible and accountable for strategic initiatives."

The three-year strategic plan (2018-21) identifies seven key strategic goals, and defines the principle parties responsible for each of the goals by assigning key responsibilities and accountabilities to the various groups/individuals through the use of a R.A.C.I. (Responsible, Accountable, Consulted, Informed) model, which identifies roles and responsibilities and avoids confusion over those roles and responsibilities. The plan provides new organizational structures which exist to shape, implement, and align accountabilities within the plan. Additionally, the plan identifies, for each of the schools within CIIS, the Key Initiatives, Strategic goals (Revenue, Student Experience, Efficiency, and Diversity & Inclusion) Tactics and Objectives desired, in conjunction with identifying the initiative leader/s and the respective timeline/s.

CIIS's financial plan, within the strategic plan, links and tracks financial delivery to the strategic plan and enables early action in case of deviations. The plan identifies CIIS's revenue generating units, which consists of four primary schools, (School of Professional Psychology & Health SPPH, School of Consciousness & Transformation SCT, American College of Traditional Chinese Medicine ACTCM, and School of Undergraduate Studies SUS) and an additional four other named units (Continuing Studies, China Projects, Development and Support Units).

For each named school/unit, there are identified strategic goals, tactics, objectives, and the leader/s/group/s responsible for completing these tasks which brings the financial management of CIIS into the strategic plan. For the four primary schools, for instance, the Deans who oversee each of the respective schools are the primary parties named and made accountable for the revenues and direct costs of each school unit. Examples of this can be seen in the strategic plan for the SPPH, where under the strategic goal of "Revenue" the tactics list the following; "Reposition PsyD and revise its' curriculum (Priority 1)" and the Objective states; "Reposition the PsyD for increased enrollment now that we are independent from APA", with both the Dean of SPPH and the PSYD Chair being listed as the responsible parties with a noted completion timeline. Also listed for the SPPH, under the strategic goal of "Efficiency" the following tactics are shown: "Review leases and clinics. Considering move of SOM clinic and sharing space strategically between PSC and GG/CC. Develop norms of retreat budgeting and spending, conference and travel spending."

This same theme can be seen for each of the schools/revenue generating units, thus assisting in tying the financial plan of CIIS together with its strategic plan and identifying the responsible parties throughout the document. CIIS current strategic plan is in its final year, thus planning for a new version or an extension and update to the current version will need to begin soon, with a continued emphasis on their identified key priorities and the future direction/goals of the institution.

CIIS has begun the implementation of a new ERP, Ellucian Colleague. At the time of the visit, the institution had gone live with the finance module, and is expected to complete the remaining modules by the end of 2021. Greater gains in efficiency across all reporting units are expected, along with cost reductions due to the largely manual efforts required by the current ERP. In addition, CIIS is continuing to work towards more robust and meaningful KPI's, which will be possible through the new ERP once implemented. These additional metrics are expected, in conjunction with the current strategic dashboard, to greatly expand the effectiveness of the current reporting structure across all departments within CIIS. (CFR's 3.5, 4.2)

CIIS, since the previous visit, has generated consistent net asset increases through their unrestricted (Without Donor Restrictions) operations, which is the primary point of measurement used to judge the fiscal health of an institution by the DOE, and for producing the most meaningful financial KPI. Steady and incremental increases to enrollments have taken place for three of the four schools, with the current projections showing more of the same for the upcoming semester. New strategies employed through Marketing and capitalized upon through Admissions have shown to be effective in building the enrollment pipeline and bringing in the increased head counts. Improvements via the new ERP are expected to bring much needed relief to the admissions area, where the majority of reporting and analysis is currently managed manually. (CFR 3.4)

The beginnings of strategic review of programmatic offerings and delivery modalities are currently being pursued by CIIS as mentioned in the schools report related to their SUS school, where the tactics mention the possible development and offering two new degrees (hybrid and online), while the objective states the following: "Conduct research to identify three degrees that are mission-driven and responsive to needs. Submit WSCUC sub-change proposal. Increase enrollment of undergraduate students by 90%". The research conducted here could potentially be applied to the existing programs as well to determine if additional efficiencies and possible enrollment increases are available. (CFRs 3.4, 4.6)

D. ***Issue 5 - Establish clear and consistent metrics and forms of evidence regarding progress toward meeting strategic plan objectives across the various units***. (CFR 4.3)

As discussed in section C (Issue 4) above, the institution is making progress toward incorporating regular use of metrics. The 2018-21 Strategic Plan explicitly defines metrics and a corresponding dashboard has been put in place. The Board's Finance Committee reviews financial updates monthly and the Composite Financial Index (CFI) quarterly. Admission has implemented SLATE as their CRM and is making effective use of its system capabilities to monitor the funnel and track communication with prospective students. Marketing is making use of analytics to monitor the impact of its social media outreach. The Board has developed a Balanced Scorecard to quantify and analyze its own strengths and gaps to inform board development. CIIS staff also seemed pleased with the outsourced IT services and adoption of *Microsoft Office 365* for students, faculty and staff, characterizing IT support as "a stable picture now."

The team noted that the implementation of the new Ellucian Colleague enterprise data system is in its early stages. Staff are anticipating a one and a half or two-year implementation timeline. At the time of the visit, the finance module was at the go-live stage. The HR component was slated for later in 2020 and the student services and registration modules were slated for 2021. Admission updates the current Jenzabar records manually as SLATE is not yet configured to integrate with the student information system. Recognizing that in-house staff are stretched thin, especially given the impact of virtualizing all services in this Covid-19 semester, the timeline may be extended. The associated cost would include extending the current Jenzabar contract and delaying some of the efficiency and data benefits of the new system.

The team recommends that CIIS fully implement the Ellucian system across all departments and functional areas to achieve efficiencies and enhance effectiveness. (CFR 3.5, 4.2)

E. ***Issue 6 - Integrate the Diversity and Inclusion Strategic Plan into the Institution's strategic plan.*** (CFR 4.6)

The CIIS Special Visit Institutional Report states that diversity and inclusion "are viewed as core to all initiatives" (p. 10). This centrality ensures that diversity, equity, social justice and inclusion perspectives are considered throughout the institution with respect to executing decisions and setting goals. As a demonstration of the institution's commitment to diversity an Office of Diversity and Inclusion (ODI) was established. The office is staffed by a Director and a Program Manager. The visiting team met with the Director and the Program Manager along with representatives of the Faculty Diversity Committee, and the Office of Diversity and Inclusion Advisory Board including a member of the faculty, the Associate Dean of Students and the Senior Grants Writer. The team asked this group to share their perspectives on how diversity and inclusion is integrated into the CIIS strategic plan. It was explained that CIIS's founding was based to a great extent on recognition of cultural perspectives. In addition, the University is strongly connected to diverse communities both in the San Francisco Bay Area and beyond. The team also learned that interest in diversity and inclusion has increasingly become a core value to the University community (as can be noted in the University's Seven Commitments). In addition, CIIS students were described as scholar-activists connected to diverse communities. It was noted to the team that "people come here for their interest in cultural exchange."

Prior to the Director's induction to her role, the University employed a Dean of Diversity and Inclusion who was instrumental in helping to develop the strategic plan and who left the University in pursuit of an alternative opportunity. Her contribution to the 2018-21 Strategic Plan included focused objectives, timelines, and assigned staff and faculty accountable for the achievement of specific initiatives in each of the four schools. Following her departure, the ODI was established by the President as a University-wide resource to support diversity and inclusion through a wide variety of University functions (i.e., student affairs, grants and development, community relations, faculty diversity committee, etc.)

In addition to efforts already noted in the Special Visit Institutional Report to WSCUC, this group offered an impressive and varied list of efforts, supporting both students and faculty, that have been initiated with the ODI's involvement. These include programs to support specific underrepresented groups, fund raising, community mental health development programs and more.

There were several other meetings during the visit including the President's Cabinet, the Board of Trustees, the Faculty Executive Committee and Curriculum and Academic Review Committee (CARC) where the question was raised regarding how diversity and inclusion was viewed and conceived as central to strategic initiatives.

During the President's Cabinet Meeting the team questioned why ODI was not represented at the Cabinet level. The President remarked that she is rethinking that arrangement and that the ODI Director is a direct report. She also added that the Office of the President and the ODI have jointly facilitated a successful diversity inspired book club. The team was given other examples of how diversity and inclusion permeate through much of the University.

The Board of Trustees described their effort to apply an intersectional lens in consideration of both the selection of new trustees and their role on the Board. This was operationalized through the utilization of the Balanced Scorecard system used, in part, to assess Board members effectiveness. The Board also described their effort to embrace a broad perspective of diversity and inclusion manifested in every aspect of the University (i.e., academic affairs, student services, presidential search, etc.) The team noted that it had been difficult to identify measurable outcomes to the University's many diversity and inclusion efforts. The Board contended that the Balanced Scorecard, proposed curriculum audits and syllabi audits could provide such measurement and they additionally noted the Curriculum Excellence Fellowship Project. There was also mention of a comprehensive diversity survey that had been given to the faculty and students, though no data or further explanation was provided.

At the Faculty Executive Committee/CARC and ODI/Faculty Diversity Committee/ODI Advisory Committee meetings the team was told how the pandemic exposed inequities within the University. Some faculty and students do not have a home office or may reside with others in tight quarters – not all students have computers, some are dealing with housing problems, food insecurity, or have lost their jobs. The team was told that the University is holding community meetings to communicate with students regarding these concerns. These groups each affirm that CIIS truly has an abundant commitment to diversity. However, the embracement of diversity and inclusion has been unequal across programs. This is said to be evident in examining differences in the curriculum in different programs. Sometimes the curriculum is very contemporary and representative of multicultural and diversity perspectives where other program curriculum is still over-representative of non-POC perspectives. There was hope expressed for there to be further help to each program in living up to the University's vision. ODI is working to assess what is needed across the campus. There was also concern expressed about faculty of color that have been recruited but who have left after a short period of time. It was

suggested that there is insufficient data about why this is happening. An example was also mentioned that suggested that the hiring process may have disadvantaged a POC candidate.

The University states that it is taking a qualitative approach to the evaluation of diversity and inclusion. Though qualitative metrics are valid, strategic outcomes identified in the plan seem to beg for measurement (i.e., increases in diverse enrollment and retention; survey data; matching US and Bay Area demographics). The Curriculum Excellence Fellowship Project was a featured exhibit, though there were no reviews of actual syllabi or pedagogical applications in the classroom or measures of how the participants were evaluated by students for improvements in their ability to teach and represent diversity. This lack of measurement leaves the question open as to whether the program was effective. The faculty and staff interviewed were in agreement that there was a need for greater accountability with how diversity is being implemented with the curriculum. The development of metrics can help direct priority initiatives and provide organizing principles regarding diversity and inclusion. This would also help ODI to be more proactive as opposed to having to address campus discords. Tracking and evaluating the recruitment and retention efforts of underrepresented students and faculty; developing and evaluating hiring processes that are truly transparent; developing structured exit interviews conducted with faculty of color and applying the data to improving retention; creating recognition through awards or commendations to members of the University community who are exemplifying diversity efforts; calculating monetary investments in diversity and inclusion efforts; curricular audits of each program with evaluative elements that define gradations of diversity content integration; and the continuation of efforts such as the fellowship program with emphasis upon definable outcomes are but a few of the ways the University could improve on what appears to be a multiculturally energetic campus.

It appears that the ODI is establishing a critical mass through growing participation in initiatives they have instituted. These efforts appear to have a positive influence on the institution as a whole. Administration also appears to be very supportive and there is positive movement within the institution (i.e., consideration being given to ODI's inclusion in higher level administrative roles such as the President's Cabinet).

F. ***Issue 7 - Establish and emphasize the central role of faculty as integral partners in the development and implementation of the strategic plan, in the development of new program initiatives, and in the evaluation and revision of current programs based on robust assessment data.*** (CFRs 3.7, 3.10)

The University's Curriculum and Academic Review Committee (CARC) Operating Manual addresses much of the concern regarding the faculty's role in strategic planning, new program development and existing program evaluation and revision. The manual along with comments provided by various members of the Faculty Executive Committee and CARC reveals satisfactory faculty involvement in the long- and short-term planning of all new and existing programs. Faculty members are responsible for academic standards, curricular sequencing and consistency of academics, degree approval, concentrations, specializations and program closures. Faculty members have a substantive role in the governance of the CIIS. In addition, faculty appear to have structures that would serve to maintain a cohesive, organized and active part in the policy decision making functions of the CIIS.

The CARC Operating Manual lays out procedures for how new programs are processed. Faculty and the Provost thoroughly explained the decision making and vetting process for the development of new programs. Presently, the faculty are evaluating certificate programs and will continue consideration of such programs into next Fall. The CARC and Faculty Executive Committee cited examples of programs

that are under consideration. Faculty and the Provost also provided a description for how they operate in alignment with and contribute to the strategic planning process.

Faculty morale is said to be very high at this time. The Faculty Executive Committee has worked hard and has assumed responsibility for ensuring faculty involvement in governance committees and for the first time have achieved fully populated committees.

SECTION III – OTHER TOPIC: COVID-19 RESPONSE

The team was impressed by the proactive and coordinated CIIS response to the Covid-19 coronavirus pandemic. The institution had quickly mobilized in early- to mid-March to "virtualize" courses and student services and enable faculty and staff to work from home. Steps included:

- A centralized approach to set up videoconferencing for over two hundred courses to meet virtually during their normally scheduled times. The Director of Online Learning coordinated this effort and enlisted library staff and other tech-savvy personnel to provide individual faculty support for these remote sessions.
- Daily meetings of the "Continuity Team" composed of Cabinet + other key personnel.
- Forums for mutual support of faculty working in a new modality.
- Forums for students to "hang out" together outside of scheduled class times.
- Weekly forums for International students held by the Dean of Students.
- Phone access to wellness coaching, disability services and career support.
- Continued access to Writing Center staff for editing help (by e-mail) and working with dissertation manager to prepare manuscripts for Pro Quest.
- Grading option to Pass/No Pass offered to all students.
- Lifted financial holds to enable summer registration; enabled cash advances for veterans.
- Plans to add questions to the year-end student survey specific to the spring 2020 virtualized experience.
- Library plans to support faculty with textbook selection and identifying online resources for summer 2020 online courses and potentially for fall should distancing remain an imperative into fall.

The institution was explicit that courses have not become "online courses" since it would have been unrealistic to on short notice train faculty and build out courses according to best practices for online course design. CIIS chose instead to keep instruction as close to normal as possible by bringing all classes into a videoconferencing model. The few students unable to join specific sessions over the internet joined in by phone. CIIS refers to this approach as "virtualized".

Interestingly, the crisis not only brought a heightened sense of community and collaboration, it also seemed to have re-energized faculty, staff and trustees' commitment to mission. The team heard from many members of the CIIS community that what they teach is needed now more than ever, that they are a community resource, and even that the last fifty years had prepared them for this moment, this time of need for resilience and the intersection of mental health, community health, spirituality and awareness of social justice issues.

Marketing was also capitalizing on this internal expertise and leadership by posting faculty-led content, posting meditations on social media and promoting themes such as "Counseling in Place",

"Wisdom in Place" and "DOORS CLOSED. HEARTS OPEN." Marketing metrics and funnel data at the time of the visit suggested a responsive public.

The institution's experience with online programs, its in-house Director of Online Learning, its regular interaction with its out-sourced IT services, and its established use of the SLATE CRM system have enabled a smooth adaptation to current needs. The coordinated response also highlights the effectiveness of many initiatives put in place in the past two years.

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

Findings

The team was positive about CIIS' progress since the last visit. Although the visit was conducted under highly unusual circumstances given the Covid-19 crisis, the team was very satisfied with the information that was shared in each of the interview sessions. Additional materials had been added to the Box account for the team's use. All areas of the institution's leadership seemed to be functioning effectively. The Board is strong. The President and her Cabinet are working collaboratively and productively. Financial management is quite competent. The utilization of technology is moving forward. Advancement and student services have continued to innovate.

The current challenge posed by the Covid-19 pandemic is cause for concern for all institutions, perhaps, especially institutions like CIIS who have recently emerged from fragile economic circumstances. Furthermore, the presidential transition planned for Summer 2021 is bound to result in some changes. Nevertheless, the current state of CIIS gives reason for optimism for the future.

Commendations

The team commends CIIS for:

1. *The level of collaboration, trust, and respect between faculty and staff in supporting the whole student, as evidenced most recently and dramatically in the proactive planning and response to the Covid-19 crisis.*

2. *Greater clarity and effectiveness in Board oversight functioning, e.g., the revision of by-laws, clarification of committee roles and responsibilities, onboarding and evaluation processes, planning for the presidential search, and utilizing the Balanced Scorecard.*

3. *The 2018-2021 strategic plan which shows solid and logical progress towards linking the strategic plan to the financial management of the institution and which clearly identifies the appropriate groups/individuals responsible for revenue, expense, and enrollment goals.*

4. *The creation and work of the Office of Diversity & Inclusion as a means of ensuring that D&I perspectives are considered in executing decisions and setting goals.*

5. *Transparency and coordination in the working relationship between the President and senior leadership and the Board, e.g., the Integral Futures Retreat and regular reporting of financial metrics including the Composite Financial Index (CFI).*

6. *Effective adoption of Admissions and Marketing practices to enhance institutional brand and enrollment pipelines.*

Recommendations

The team recommends that CIIS:

1. *Formalize processes for succession planning for short-term and longer-term vacancies/gaps in senior leadership positions. CFR 3.9*

2. *Add appropriate quantitative metrics to assess the progress of the diversity and inclusion efforts. CFR 1.4*

3. *Fully implement the Ellucian ERP across all departments and functional areas to achieve efficiencies and enhance effectiveness. CFR 3.5, 4.2*

4. *Conduct a strategic review of all programmatic offerings and delivery modalities in the context of enrollment trends. CFR 3.4, 4.7*

5. *Continue to implement strategies to increase revenue and achieve net increases in unrestricted net assets/operations to sustain institutional mission. CFR 3.4*

6. *Extend the existing or develop a new strategic plan in order to address key priorities and future direction beyond 2021. CFR 4.6*