

REPORT OF THE WSCUC TEAM  
SPECIAL VISIT

To Pacific Oaks College

October 22-25, 2019

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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**

On October 22-25, 2019, a WSCUC evaluation team of three members visited Pacific Oaks College (PO) of Pasadena, California, to address the eight recommendations identified during the reaffirmation visit held March 1-3, 2016. The visiting team acknowledges the gracious hospitality, openness, and cooperation extended by the campus community. Preparation and accommodations for the site visit were most appropriate and served the team well.

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

Since its founding in 1958 as an outgrowth of the renowned Pacific Oaks Children’s School, Pacific Oaks College has been distinguished for its mission to promote educational practices that “prepare students to be culturally intelligent agents of change serving diverse communities in the fields of human development, education, and related family studies.”

Pacific Oaks was first accredited by WSCUC in 1959 to offer degrees in Human Development at the undergraduate and graduate levels. In July 2009, Pacific Oaks College and Pacific Oaks Children’s School became a corporate entity, Pacific Oaks Education Corporation (POEC), which affiliated with TCS Education System (TCSES) in June 2010.

The main campus of Pacific Oaks College is in Pasadena, with ten approved off-site instructional locations. A branch campus in San Jose, approved by WSCUC in February 2016, was visited by members of the special visit team; two of the satellite locations report to the branch campus administration and faculty. Pacific Oaks (PO) operates on a trimester basis and offers 14 degree programs (six bachelor’s, eight master’s) and three teaching credential and certificate programs; 11 of the degree programs and one certificate are offered online:

- BA – Advocacy and Social Justice, Community Psychology, Early Childhood Education, Early Childhood Education with credential, Human Development
- BS – Business Administration
- MA – Curriculum & instruction,\* Early Childhood Education, Education with

- credential, Human Development, Advocacy & Social Justice, Organizational Leadership & Management, Marriage and Family Therapy,\* Cultural and Family Studies\*
- Non-degree – Preliminary Education Specialist credential,\* Preliminary Multiple Subject Teaching credential,\* STEAM certificate

(\*Programs without online offerings are marked with an asterisk.)

PO was a BA-completion institution until fall 2018 when it first offered a complete selection of general education courses. Today, all undergraduate degree programs are full four-year programs. More than 50% of students are enrolled in graduate programs.

The demographics of PO students are distinctive and reflective of the college's mission, with 87.4% of the 1,163 students attending in fall 2019 being women; 90% of all students are part-time. Of the total enrollment, 41.4% (482 students) are enrolled in online programs, 37.9% (441 students) attend courses on the Pasadena campus; and 20.6% (240 students) take coursework at the branch campus or other off-campus instructional sites. The fall 2019 enrollment figures indicate a slight 6% decline, primarily at the main campus (30%) but with significant growth in the online programs (62.2%), since the accreditation visit conducted in spring 2016. As an Hispanic-Serving Institution, a majority of the total student population identify as Hispanic/Latinx (48.3%); 21.8% as White; 13.2% as Black or African American; and 13.2% as Asian; the mean age is 36.

Recent financial stability allowed PO to acquire its current campus in late 2016. This major purchase of approximately \$21.5 million properties solidified the school's roots within the City of Pasadena; part of these properties is now rented (details in section on recommendation seven). Dr. Jack Paduntin was hired in January 2019 to serve as interim president when President Patricia Breen announced her retirement, an appointment made official in May 2019. The issue of leadership transitions since the Accreditation Visit was explored by this visiting team, but no significant concerns were raised.

This Special Visit was scheduled to address the eight recommendations identified during the 2016 reaffirmation visit:

1. That the college more clearly articulate, map, and assess WSCUC core competencies [CFR 2.2, 2.2a].
2. That the college put systems in place to maintain a comprehensive system for assessment of student learning, both at the program and institutional level [CFR 2.6, 4.1, 4.3].
3. That administration continues to include faculty voice and full participation in the shared governance of the college [CFR 3.7, 3.10, 4.5].
4. That the college increase the number of professionally qualified faculty to deepen the college's diverse intellectual environment and care for the expanding needs of students [CFR 3.1, 3.2]. In addition, the college ought to clarify its computation of faculty FTE and faculty- student ratio to conform to standard industry practice (CFR 3.1, 3.2, 4.1).
5. That continued progress be made in the use of graduation and retention data for curricular change and student support [CFR 2.10, 3.7, 4.1].
6. That the Board of Trustees and college leadership continue to regularly monitor the level of financial support provided by TCSES and Pacific Oaks's own independent financial strength and sustainability [CFR 1.5, 1.7, 3.6, 3.7, 3.9].
7. That the college continue to strengthen the financial viability and staffing stability of the college given high dependency upon enrollment growth and needed resources to properly serve students, faculty, and staff [CFR 1.5, 1.7, 3.4, 3.5].
8. That the next strategic plan be broadly inclusive of all stakeholders and incorporate an assessment framework [CFR 3.7, 3.9, 4.6].

## **B. Description of Team's Review Process**

The team received the Special Visit Report on August 15, 2019, and discussed it in a conference call on October 15, 2019. The team chair and WSCUC vice-president visited the San Jose branch campus on Monday, October 21, where they met with the ALO, campus dean, enrollment services and student success personnel, three core faculty, and one student. During the Special Visit, the team met on the Pasadena campus with the president and his executive cabinet, members of the WSCUC Steering Committee, academic leaders, the faculty assessment committee, the PO Board of Trustees, and remotely with the auditors, Office of Institutional Research, and members of TCSES; in all, a total of 49 PO and 12 TCSES employees and 6 board members in sixteen different meetings. Additionally, the team attended open forums with full-time PO faculty, adjunct faculty, and students and toured the Pacific Oaks Children School.

Student comments received via the confidential email account centered on difficulties encountered with academic advising. PO recently created and filled a dean of students position who will oversee student services and plans to review the advising process.

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

The institutional report submitted by Pacific Oaks College was found to be a factual and accurate description of the institution. In its response, PO grouped the eight recommendations into three categories: academic and student success (1, 2, 4, 5); shared governance (3, 6, 8); and financial performance (7). This report will address the recommendations as enumerated in the Commission action letter. Data and documentation to support the report were available on Box.com and additional information requested by the team was provided in a timely manner.

A team of seventeen members of the administration, faculty, and staff led the self-study process at PO, engaging faculty, selected staff, and administration in self-review. As an

organization committed to learning and improvement, PO regarded the review as an opportunity to extend its development and strengthen its sustainability, resources, and organizational structures.

The same levels of engagement and preparation with the issues of this visit were evident during the visit to the San Jose branch campus, which appeared strongly connected to the organization of PO in terms of inclusion of staff and faculty with mission-centric work, such as curriculum and support.

## **SECTION II – EVALUATION OF ISSUES**

### **A. Update on Assessment of WSCUC Core Competencies (CFR 2.2, 2.2a)**

In its Report for the Reaffirmation of Accreditation of PO, the 2016 evaluation team concluded that “learning outcomes assessment remains at [a] lower stage of development: learning outcomes are designed and the program review tracks assessment, but there is little evidence of significant assessment studies or projects, and little evidence of use of results to improve teaching and/or learning methods” (29-30). To evaluate progress related to this finding, particularly in relation to the WSCUC Core Competencies, the 2019 team reviewed assessment data provided by PO in Box/binders. The team also requested current program reviews and asked to view information uploaded in digital workspaces in its Accountability Management System (AMS), which the college acquired in 2017.

Evidence in Box and PO binders indicate that program learning outcomes (PLOs) were mapped to the college’s institutional learning outcomes (ILOs) and WSCUC core competencies in the BA in Early Childhood Education, in Community Psychology, and in Human Development (Evidence 08, Mapping of Program learning outcomes and WSCUC Core Competencies). This information also was uploaded to the AMS digital workspaces during the

spring and summer of 2018, allowing for use beginning in the 2018-2019 academic year. In addition, PO has mapped WSCUC core competencies in its BA programs as well as in its General Education program (Evidence 09, Curriculum Map to WSCUC Core Competencies). PO indicates in its institutional report that the core competencies are “integrated into designated coursework and evaluated on a continuous basis via the signature assignments for each course” (8). However, consistent evidence of assessment of the integrated core competencies in signature assignments was difficult to locate in both the AMS digital workspaces and in program reports. The following section examines how the individual BA programs are responding to the recommendation.

#### Current State of Articulating, Mapping, and Assessing WSCUC Core Competencies

##### BA in Human Development (School of Human Development)

PO states that the core competency of information literacy is measured through signature assignments in these classes: HD 355, HD 471, and HD 491. The evidence provided includes a detailed assessment plan, a core course PLO and WSCUC Core Competency assessment matrix, and formative and summative assignments identified for assessment of the PLOs.

For the core competency of quantitative reasoning, PO notes that the college had no signature assignment to measure quantitative reasoning for the HD BA before 2017. Therefore, in the 2017-2018 school year, the college revised the HD 497 Capstone signature assignment to include quantitative reasoning, which was available for the 2018-2019 assessment cycle. PO also indicated the courses and signature assignments that are used to measure the core competencies of critical thinking and for oral and written communication.

The team also reviewed the School of Human Development Annual Program Review (November 2018), provided in a PowerPoint format and found evidence that written

communication and critical thinking were reviewed annually in BA HD from 2015-2018; information literacy was reviewed in 2017-2018. During the 2017-2018 cycle, the report suggests students scored above the benchmark of 2.5/4 in written communication, critical thinking, and information literacy. However, it is unclear from the program review how the benchmark was set.

#### BA in Advocacy and Social Justice (School of Human Development)

Established in summer 2018, the BA in Advocacy and Social Justice (BA ASJ) “shared the same foundation” as the BA HD program (PO Special Visit Report 9). PO reports that the program’s first assessment cycle was completed in 2019.

The School of Human Development Annual Program Review November 2018 includes data on the assessment of written communication and critical thinking during the 2017-2018 cycle in the BA ASJ. Scores in both competencies were 2.3 and 2.72, respectively, and appear to be below the benchmark of 2.75/4. Similar to the BA HD program review, it is unclear how the benchmark was set.

#### BA in Early Education (School of Education)

PO indicates that the BA in Early Childhood Education (BA ECE) shows alignment of signature assignments with core competencies, except in the area of quantitative reasoning. The SOE has action research courses (ECE 400, 401, 402), which require some degree of quantitative reasoning; however, the school has “determined that revisions are necessary to strengthen students’ learning in this measure” (PO Special Visit Report 9). Although each course in the BA ECE also has identified a central signature assignment, it does not appear that consistent assessment of student learning of the core competencies has taken place yet.

### BA in Community Psychology (School of Cultural and Family Psychology)

PO indicates that when this program was established in fall 2018, it used the WSCUC substantive change proposal to assist in articulating, mapping, and identifying key signature assignments for all core competencies.

As is evident, PO has completed important work in its bachelor degree programs in creating assessment plans, mapping core competencies to PLOs and ILOs, aligning different learning outcomes, and integrating core competencies into coursework for evaluation through key signature assignments (CFR 2.2, 2.2a). In addition, it has devoted significant time and effort to inputting all of this data into the AMS digital workspaces. PO's president describes the college's assessment efforts as a "work in progress," which is certainly true. The evaluation team, though, concurs with the 2016 team's findings that "learning outcomes assessment remains at [a] lower stage of development" (29). This point appears particularly true in relation to the consistent assessment of WSCUC Core Competencies in all BA programs and in using such results "to improve teaching and/or learning methods" (30). The president, administration, and faculty appear cognizant of this point. As PO's report states, although each BA degree program includes a thorough assessment plan and embeds the core competencies, the faculty will "need to ensure that assessment activities are manageable and sustainable" (10).

#### **B. System for Assessment of Student Learning (CFR 2.6, 4.1, 4.3)**

The recommendation that the college put systems in place to maintain a comprehensive system for assessment of student learning, both at the program and institutional level also emerged from the 2016 report finding that "learning outcomes assessment remains at [a] lower stage of development" (29). To evaluate actions taken since this recommendation, the 2019 team reviewed assessment data provided by PO in Box/binders and requested annual program reviews

and viewed information uploaded in digital workspaces in its AMS program. After the team surveyed the annual program reviews, PO suggested that the team might also want to examine the Annual Program Review Academic Meta-Review (March 26, 2019), which was particularly helpful in providing an overview of the different schools' assessment activities. PO's Special Visit Report also includes information on the different faculty committees and subcommittees that are in place to oversee the assessment and program review processes.

In its report, PO asserts that the college "utilizes a faculty-driven assessment model" and that "[a]ssessment of student learning is systematic and continuous" (11). To provide context for this claim, PO states that faculty assess student learning based on the procedures outlined in its Annual Program Review Procedure and Templates. PO also refers to its five-year Comprehensive Academic Program Review, which includes three parts: "(1) the student learning assessment, providing evidence of student learning based on program learning outcomes; (2) the program effectiveness, measuring how well PO is supporting student learning; and (3) the meta review, combining and prioritizing finding, recommendations, and proposed actions plans" (11). Given that only templates of the program review processes and procedures were provided as evidence, the team requested to examine examples of the annual reviews, which PO provided. Comprehensive Academic Program Reviews other than Human Development were not readily available, and it was unclear if the reviews were being completed on a consistent basis. Future WSCUC evaluation teams should review examples to better understand the state of the Comprehensive Academic Program Review process (CFR 2.7).

The annual program reviews provided additional information on PO's assessment of student learning. For instance, the School of Human Development Annual Program Review November 2018 (PowerPoint) indicates that during academic years 2015-2018, the BA HD

PLOs 1-5 appear to have been assessed (Development, Diversity, Communication, Research, and Praxis, respectively), with students scoring above the benchmark of 2.5/4 in all five PLOs during the 2017-2018 cycle. Likewise, the BA ASJ PLOs 1-5 for the 2017-2018 cycle also were assessed. Scores appeared above the benchmark of 2.5/4 in Diversity and Praxis and below in Development, Communication, and Research. Discussion of how the benchmarks were established was not provided in the reviews.

The School of Cultural and Family Psychology 2018 Annual Program Review includes data on “Longitudinal trends from 2013-2018 on all Program Learning Outcomes” that suggest improvement in achieving the PLOs during the five-year period. The presentation also shows the most recent Board of Behavioral Science Law and Ethics Internship Exam Results, January to June 2018, which had improved to 64% (77% statewide average) compared to 57% (72% statewide average) July to December 2017. However, of the 38 institutions listed, PO’s scores were the second lowest in both testing periods. The PowerPoint also notes that the BBS Law and Ethics Exam has been changed to an assessment given at the beginning of each student’s internship rather than the end after the completion of 3,000 required clinical training hours. Given that PO students have scored consistently below the statewide average, the slide indicates that a Law and Ethics Training exam would be piloted in fall 2018, but this was not verified.

The Annual Program Review, Academic Meta Review (March 26, 2019), states that School of Education signature assignments were not “consistently assessed” in the Learning Achievement Tools (LAT) by Taskstream and that the program was not “meeting the needs” of the SOE credential programs. In its report, PO indicates that, based on faculty input, Portfolium replaced LAT in 2019. The Meta Review from SOE also indicates the need to align signature assignments with PLO(s), course learning outcomes, module learning outcomes (online), and

California Commission on Teacher Credentialing or National Association for the Education of Young Children standards.

The Meta Review for the School of Interdisciplinary Studies states the need for curriculum maps and an assessment plan.

The Meta Review for the School of Human Development indicates the need to assess WSCUC Core Competencies of quantitative reasoning and oral communication. Under “Additional Areas of Concern,” the school included the following two points:

- Evaluate the integrity and validity of our assessment measures. Incorporate additional meaningful measurements into our assessment practices. Close the loop between assessment results and educational policies and practices.
- Need assessment software that fully replaces manual data collection (including selecting work samples, distributing and collating reviewer’s ratings), with adequate training and ongoing support for both core and adjunct faculty.

These concerns reflect that school faculty are aware of the limitations of current assessment practices, both in terms of using assessment results to improve student learning and in terms of the need for ongoing support and training for core and adjunct faculty (CFR 2.6, 4.1, 4.3).

From this review of existing systems in place at PO to sustain a comprehensive system for assessment of student learning at the program and institutional levels, it is apparent that the college has devoted significant time to creating such systems, from its annual program reviews, to its AMS program, to PO’s assessment and program review committees. It also is apparent that PO has faced technical difficulties with implementation (e.g., the LAT program), as well as difficulties in articulating with outside standards, as in the case of SOE. At a meeting with faculty, several present also indicated difficulties concerning changes in college priorities

related to assessment, given administrative turnover. However, as the areas of concerns identified by the School of Human Development suggest, faculty and PO need to “Close the loop between assessment results and educational policies and practices.” PO needs to regularly collect, analyze, and aggregate assessment results at the program level to foster program improvement of pedagogy and learning. Furthermore, adequate training and support needs to be provided to core and adjunct faculty and formalized and consistent methods of evaluating adjuncts needs to be implemented. The team recommends that faculty continue to develop learning outcomes assessment and use the results to improve student learning (CFR 2.3, 2.4).

### **C. Faculty-Administration Communication (CFR 3.7, 3.10, 4.5)**

Prior to the visit, the team reviewed the Faculty Bylaws and results of a faculty survey administered in early 2019 on shared governance, both designed in response to the recommendation that administration continue to include faculty voice and full participation in the shared governance of the college. Faculty committee structures are clearly described in the bylaws and were frequently mentioned in conversations with faculty groups. The Faculty Council identified three areas of improvement, according to the survey results: institutional communication, joint decision-making, and faculty role and workload.

In our meeting with the council, faculty described their involvement in recent leadership hires as members of search committees, the process of new program development that originates with them, and improved communication with administration and staff. Faculty expressed improved access to the president and the board of trustees; the chair of the faculty council attends the president’s cabinet and board meetings, and the president is invited to faculty meetings to discuss concerns. Another example of improved communication is the recent dialogue with academic advising personnel to help bridge the knowledge and/or support

gap between these two groups who serve students.

Faculty offered these examples of the inclusion of their voice and participation throughout the institution:

- Donor scholarship application evaluation
- Facilities renovation project
- Policy Committee
- WSCUC Steering Committee
- Strategic Plan Task Force
- Faculty, staff, and administration search committees
- Faculty governance survey
- Center for Excellence Task Force
- Selection of the new president

In the visit to the San Jose site, the team met with three full-time faculty who are active participants in PO governance, overseeing the academic program offerings and adjunct faculty assignments there and at regional instructional sites, and participating in curriculum development and assessment of student learning with their counterparts on the main campus.

Overall, faculty spoke positively about the potential of AMS to support their assessment work, although it previously had been a point of contention for faculty who felt the decision to acquire Taskstream products had been made without their input. Concurrent with the software acquisition and implementation has been a transition of leadership in assessment from administration to faculty.

The role of adjunct faculty, who teach 80% of courses, is not acknowledged in the Faculty Bylaws, which views them as guests. However, adjunct faculty affirmed that core faculty and other long-term adjuncts provide mentoring in the PO pedagogy. They are invited to participate in faculty development meetings and at school meetings when student learning outcomes, program outcomes, and program review are being discussed, but distance and schedule often prevent their participation. Adjunct faculty receive no regular salary increases

nor performance reviews other than those in student course evaluations. Both core and adjunct faculty affirmed not having any “reliable data about adjunct teaching quality.” Although adjuncts with whom the team met seemed highly appreciative of the mentoring and support they had received from core faculty, only one adjunct in SOE indicated that a core faculty member met with her each semester to discuss her teaching performance. Two noted they could not remember being formally evaluated during the past four and five years, respectively, that they had been teaching at PO. With the hire of several new core or administrative faculty who had previously served as adjuncts, these concerns will be addressed by the Faculty Council through a newly convened Adjunct Faculty Task Force.

In their discussions of increased faculty voice, the faculty noted the lack of a formal channel for student voice and supported establishment of the new Student Government Association.

The team recommends that the college develop and apply procedures to evaluate its adjunct faculty on a regular basis to ensure the quality of their educational programs (CFR 2.1, 3.1, and 3.2).

#### **D. Faculty Qualifications (CFR 3.1, 3.2, 4.1)**

PO responded to the recommendation to increase the number of professionally qualified faculty to deepen the college’s diverse intellectual environment and care for the expanding needs of students by adding six full-time since the 2016 visit, for a total of 22 core and administrative faculty. The traditional faculty rank and titles used in 2016 were eliminated for at least two reasons: philosophically, they were thought to violate the Quaker tradition of collegiality, and operationally, a new system allows for some faculty to substitute administrative or program development duties for teaching load. New hires, who often began as adjunct faculty, bring a

variety of academic backgrounds as PO has moved from its practice of hiring alumni. Eighty percent of the core faculty possess doctorate degrees; of the remaining 20%, many hold a terminal master's degree in their field. Three full-time faculty oversee the programs in education, cultural and family studies, and human development in San Jose and its instructional sites; these faculty contribute to and often lead committees, participating through regular virtual or physical presence in Pasadena.

The college clarified its computation of ratios by adopting the IPEDS calculation for faculty FTE and faculty-student ratio, which they report are 42.75 and 1:5, respectively. Faculty demographics generally reflect the student population in gender and ethnicity.

The increase in number of faculty allows for greater participation in shared governance, mentoring of adjunct faculty, and individualized attention to student success (CFR 3.1, 4.4). Endorsement of new assessment and student success software platforms aligns with their respect for the unique values and experiences of others that characterizes a PO education. The team commends faculty commitment to PO's mission, pedagogy, student learning, and success.

#### **E. Use of Graduation and Retention Data (CFR 2.10, 3.7, 4.1)**

PO was asked to continue progress in the use of graduation and retention data for curricular change and student support. The college receives support from six professional staff at the TCSES Office of Institutional Research (OIR) in the areas of survey research, institutional data, statistical analysis, internal and external reporting, and academic assessment support. PO itself does not appear to have any individual hired specifically to address Institutional Research. TCSES OIR provides data using "'Slicer,' an interactive tool to filter data in a pivot table relevant to the user needs" (PO Special Visit Report 21), but they admitted to the team that the Slicer information can be difficult to comprehend, as it includes primarily raw data. The TCSES

staff were unable to offer the team any specific information or insight on PO's recent graduation and retention data; however, they emphasized that both administration and faculty could benefit from additional training in how to ask questions that lead to appropriate data and in how to analyze such data.

One area of student retention that has been a concern for the college is the retention of its online students. For example, the fall 2018 retention rate for online students was 54.7% as compared to 70.8% for the college overall. In response, the president in 2019 created the position of dean of students to enhance online retention rates. The new dean has implemented several initiatives to improve retention rates, including training for online learning during the new student orientation and the Drop-Out-Detective software program, which identifies at-risk students and allows instructors to "Activate Advisor Alerts." PO provided data in its report indicating that of the 176 students who received the alerts, 47% of "the identified at-risk students were retained" and that "14% of the students retained have graduated or are progressing toward graduation status" (22). PO also has created a Retention Outreach Specialist position to target students who have withdrawn within a 365-day period to encourage them to return and finish their degrees.

In its report, PO also discusses how the annual program review is used to monitor graduation and retention rates. For example, after evaluating its program review data in 2015-2016 and 2016-2017, the School of Education made several curricular changes to its BA in Early Childhood Education (ECE) to improve retention and persistence. In addition, with the increase in its online population, the school approved a new full-time core ECE faculty position for the 2019-2020 academic year. The school also assigned an experienced ECE adjunct as an online

advisor during spring 2018. BA ECE retention rates went from 49% in 2016-2017 to 77% in 2017-2018 (PO Special Visit Report 24-25).

The SOE example reveals positive ways PO has responded to retention issues with the increase in its online student population. However, the college still has challenges to address. For instance, the Meta-Review Action Items Executive Summary for the 2017-2018 cycles (March 2019/Evidence 30) indicates a need to “Improve Effectiveness of Online Systems and Practices.” The following items are listed under this heading:

- Graduation, 1yr retention, and 1<sup>st</sup> semester persistence are mostly down.
- Student satisfaction is inconsistent across classes, programs and instructors.
- Rapid growth in online programs is revealing critical gaps in infrastructure and support for online faculty and students.

The team recommends the college monitor the growth of the online programs to ensure quality consistent with PO’s mission and measures of student success (CFRs 2.12, 2.13, and 4.4).

The college also appears aware of the lower first-year retention rates for males and Black or African American students at both the BA and MA levels. Overall first-year retention rates by race/ethnicity/gender in fall 2017-2018 indicate that Black or African Americans have a retention rate of 56.7% and males at 46.9% (70% overall retention rate). In the MA-degree-level programs in fall 2017-2018, the first-year retention rate is 57.1% for Blacks or African Americans and 36.9% for males (68.6% overall retention rates). Note that the programs are small; thus, the sample sizes also are small, which can skew results. In its report, PO states that retention rates for male students have been substantially lower than overall rates and that the new dean of students is developing retention strategies to respond to the issue. In addition to its male students, PO might develop strategies to address the lower retention rate in its Black or African American student population.

The college relies heavily on TCSES for data but needs to develop its own systems of analysis. The team recommends that the college continue to commit resources to manage, analyze, and disaggregate data to track and improve student success (CFRs 2.7, 2.10, and 4.1).

**F. Relationship with TCSES (CFR 1.5, 1.7, 3.6, 3.7, 3.9)**

The Pacific Oaks College (PO) and the Pacific Oaks Children's School (POCS) make up the Pacific Oaks Education Corporation (POEC). The POEC is an affiliate of TCS Education System (TCSES), a nonprofit organization providing fee-based operational services in the areas of human resources, legal, regulatory and compliance, marketing, institutional research, financial aid, recruitment and admissions, online course platform, academic, and international activities. These services, offered to its affiliates, provide a scale of resources and operational expertise that each individual school would not have the financial resources to provide the community it serves. With the dependency established with this affiliation agreement, the monitoring by PO of TCSES and the other schools within the affiliate system is of the utmost importance and the focus of this recommendation. The team found that PO's leadership and the college community are effectively using the management service support system to enhance its financial strength and vitality as well as the enhancement of the student's success and educational experience (CFR 1.5, 1.7, 3.6, and 3.7).

The PO Board of Directors acts independently of the affiliate system (CFR 3.9). The Board of Directors and the executive leadership of PO continuously monitor the services and the sustainability of the system. The monitoring is twofold: first, the college's financial and operational goals using the systems support and, second, the system's financial stability. PO's Board of Directors and its executive leaders use both formal meetings and informal opportunities in monitoring the college, the system, and the systems' other affiliate schools' financial strength.

These surveilling factors can be seen in regular operational internal reports, fiduciary council meetings, TCSES representative having a seat on the PO's Board, PO's president attending TCSES's Board of Director meetings, an all-system affiliate president council monthly meeting, and regular meetings on daily operations attended by PO's executives and related service function TCSES's representative. These monitoring factors offer a timely assessment of service, which ensures effectiveness of the agreement. They also ensure responsiveness to the system affiliates operational changing needs.

As documented in the college's report and demonstrated during our site visit, PO's Board of Directors and executive leadership continually monitor and assess the needs of the college and the effectiveness of the support services provided by TCSES as well as the financial implications of the agreement. The college maintains its independence in the institution's core functions of recruitment of faculty and academic personnel, the development of academic programs, assessment of its academic programing, and the decision process in admissions and academic performance.

PO, as an accredited institution, bears the final responsibility for ensuring the quality and integrity of all activities conducted in its name and, therefore, must actively and continually monitor the relationship and services provided by its outside service provider TCSES.

#### **G. Financial Viability and Staffing Stability (CFR 1.5, 1.7, 3.4, 3.5)**

PO's leadership and community have recognized that adaptability to changes in the needs of the students, educational community, and its financial environment will continue to be a focus to ensure success and financial stability. The college currently demonstrates a strong financial position, receiving an unqualified, clean audit opinion for the fiscal years ended 2017, 2018 and 2019. The U. S. Department of Education issued a composite score for PO of 2.9 in 2019 (3.0 in

2017 and 2018). This composite score indicates the institution is recognized for being financially responsible, healthy (CFR 1.7).

The Statement of Financial Position as of 2019 presents cash and investments of \$18M. Financial Assets of \$8M are available to fund current operational needs. Total net assets have steadily shown growth with a slight decrease of 3% occurring in 2019. In 2017 the college purchased the Pasadena campus, plus adjacent land/building parcels for \$21.5M. The property was purchased using available cash reserves of \$2.5M and incurring long-term debt financing of \$19M. Debt payments for 2019 included principal payments of a little over \$600k and interest payments of \$673k.

The college has presented an operational surplus for 2017 (\$70k) and 2018 (\$830k) and a slight operational deficit in 2019, (\$6k). The college is tuition- and fee-revenue dependent with 98% of current revenue driven from enrollment. PO's net tuition and fee contribution ratio is stable but higher than the standard, which also confirms the institution's sensitivity to enrollment patterns. Tuition and fees revenue has been consistent for the last several years, showing no growth in overall enrollment. PO's other revenues have grown substantially (56% in 2018, 34% in 2019). This growth is due to the diversification of revenue sources and the growth within the advancement area. With the purchase of the Pasadena property, the college diversified its revenue sources with the collection of rental income (2019 net rental income of \$569k). The operational advancement funding grew over 150%, from \$162k in 2018 to \$410k 2019. This growth is due to the PO advancement department with the aid of the TCSES professional service initiatives. The college illustrates its response to the change in its students' needs (enrollment focus) through the offering of new programs, offsite educational partnerships, and online programing.

The college exhibits a current focus of hiring and retaining quality faculty and staff. PO hired a new associate vice president for human resources in 2019. With this new hire and the TCSES HR management initiatives, the college is increasing its employee retention. Many positions have been filled with promotions with existing qualified and mission-driven employees. The college needs to continue to work toward offering competitive salaries to retain and recruit quality faculty and staff.

The college's budgeting process appears robust and inclusive of all staffing levels, departments, and the professional management services of TCSES. This function allows the PO and TCSES leadership teams to continually monitor the annual goals and objectives of the institution. This allows PO's leadership to adjust financial resources to keep on task of the institution's future sustainability (CFR 3.4).

The college's future financial viability will be impacted based on future enrollment, outcome of an outstanding legal issue in the Children's School, resolution of the property tax exemption for all or part of the Pasadena property purchased, and the servicing of the long-term debt incurred in the property purchase.

#### **H. Strategic Planning Metrics of Success (CFR 3.7, 3.9, 4.6)**

The development of PO's 2018-2020 strategic plan was inclusive of all stakeholders, including the board, at various stages of the process, and incorporated an assessment framework within the plan. The vision of the 2018-2020 Strategic Plan is that

By the year 2020, Pacific Oaks College will establish its path to national prominence as a value-oriented, socially progressive institution through the impact of graduates who bring passion, professional competence, and advocacy to the individuals and communities they serve. The College commits to an education grounded in its distinctive pedagogy, social justice, a belief in the potential of every individual, curricula that are current and relevant, support that enables access and value for adult learners, and to a sustainable financial future.

To fulfill that vision, PO identified four goals—grow new student enrollment, develop programs for new markets, increase academic quality, increase student retention – each supported by 3-5 broad strategies that are refined annually. Each goal is assigned to a PO leadership member for implementation through the assignment of committees for each area of the strategic plan. Progress reviews appear to have been consistent and transparent. PO’s president reports the progress to key stakeholders, and their feedback is used to adjust the plan and operations to ensure that the set goals are achieved (CFR 4.6).

During the visit, the team heard of the flexibility of the plan to design annual strategies to reach their modest measures of success. For example, 10 new sites have been approved since 2016; none is mentioned as part of plan. Rather, new sites are one means to achieve the goal to Grow New Student Enrollment by “Expanding partnerships to create career and degree pathways.” The team reviewed annual and semester progress reports on each initiative, but saw no tracking toward the summative measure of success. The team recommends that the next strategic planning process continue to mature, incorporating and refining metrics and indicators of success (CFR 4.6).

### **SECTION III – FINDINGS, COMMENDATIONS, AND RECOMMENDATIONS**

The team found notable progress in all eight recommendations, which were clearly a part of the plans, discussions, and initiatives across the institution. No new areas of concern arose from this visit; however, in two areas the team broadened the original recommendation to explicitly include adjunct faculty and online programs in the next review.

#### **Commendations**

The team commends Pacific Oaks in particular for the following accomplishments:

1. Preparing thoroughly and conscientiously for the October 2019 Special Visit.

2. Fostering faculty commitment to PO's mission, pedagogy, student learning, and success.
3. Developing an assessment infrastructure, including aligning student learning outcomes at the institutional, program, and course levels and mapping the core competencies to program learning outcomes.
4. Strengthening PO's financial position through diversification of revenue sources.
5. Purchasing and making extensive capital improvements to the main campus.
6. Effectively using management service support.

### **Recommendations**

The team identifies the following issues for further development:

1. That faculty continue to develop learning outcomes assessment and use the results to improve student learning (CFR 2.3 and 2.4).
2. That the college continue to commit resources to manage, analyze, and disaggregate data to track and improve student success (CFR 2.7, 2.10, and 4.1).
3. That the college monitor the growth of the online programs to ensure quality consistent with PO's mission and measures of student success (CFR 2.12, 2.13, and 4.4).
4. That the college develop and apply procedures to evaluate its adjunct faculty on a regular basis to ensure the quality of their educational programs (CFR 2.1, 3.1, and 3.2).
5. That the strategic planning process continues to mature, incorporating and refining metrics and indicators of success (CFR 4.6).