

PART A

ACTIONS REGARDING RECOMMENDATIONS

RECOMMENDATION EIGHT FINANCE

“The committee recommends that Eastern Oregon University immediately undertake an assessment of the effects which decentralization of system functions has had and will continue to have on all aspects of campus operation, especially financial operations. The changes are already happening and must be accommodated rather than studied (Standard 7).”

Standard 7—Finance

Summary of the 1999 Focused Interim Report

After the University developed a strategic plan, the Administration and Finance area developed a budget planning process.¹ This planning process, informed by institutional strategic planning, helped the University make a transition from system-level centralized, static budget management to an institution-level decentralized, participatory management approach.

The Administration and Finance area proactively developed, and continued to enhance, the budget and planning process as guided by the University strategic plan.

Three major events occurring within the Oregon University System (OUS) have changed the scope of Eastern Oregon University’s (EOU’s) financial operations.

- Financial Information System (FIS). This system was designed for each institution to maintain full financial information responsibility. It also provided the institution’s ability to aggregate information to OUS for audited annual reporting.
- Higher Education Efficiency Act – 1995 (SB271). This Oregon Legislative act delegated authority for personnel, labor relations, purchasing, and contractual actions to be maintained at each institution.
- Human Resources Information System (HRIS). This system provides distribution of payroll, benefit, and position control responsibility to each institution. It also allows OUS to aggregate information for OUS reporting.

The Administration and Finance departmental strategic plan addressed the effects of decentralization.² Administration and Finance ascertained that the University’s fiscal and physical assets could only be stewarded through leadership in planning and budgeting. Administration and Finance is the foundation for achieving the University strategic plan’s objectives. Administration and Finance has ensured, through enhanced budgeting and management information reporting, that the institution is financially viable. The University has developed a detailed internal audit process, in consultation with the OUS Internal Audit Office and outside independent auditors Deloitte and Touche. In September 1999, the University implemented the internal audit plan.³ Limited resources have required that the institution rely heavily on the OUS Internal Audit Division. OUS has audits in the Cashiering area, Purchasing, Human Resources, Engineering and Technology Council, Procurement Card Usage, Family Educational Rights and Privacy

¹ See Exhibit 1, 1999 Focused Interim Report; see also Exhibit 6, Strategic Planning: 1999.

² See Exhibit 1.B “Administration and Finance Strategic Plan and Goals” (1999).

³ See Exhibit 1.C “Internal Audit Plan” (1999).

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Act (FERPA), and Informational Technology (IT) usage. Moss Adams completed an external audit on unofficial withdrawals and the Eastern Oregon Headstart Division.⁴

Exhibits (available on campus)

- 1** **1999 Focused Interim Report**
- 1.B** **Appendix B: Administration and Finance Strategic Plan and Goals (1999 FIR)**
- 1.C** **Appendix C: Internal Audit Plan (1999 FIR)**
- 2** **Moss Adams External Audit**
- 6** **Strategic Planning: 1999**

⁴ See Exhibit 2, Moss Adams External Audit.

RECOMMENDATION NINE FINANCIAL PLANNING

“The committee recommends that the institution—as it begins strategic planning—respond to Standard 7 by doing financial planning that includes three year projections of major categories of income and specific plans for major expenditure categories (7.A.2 and 7.A.3). Pursuing financial planning and constructing appropriate budget plans allows the institution to create priorities, underline the rational nature of their budget requests for boards and legislatures, and have a well understood baseline plan which can be modified when allocations are announced.”

Standard 7.A.2-3—Financial Planning

Summary of the 1999 Focused Interim Report

The University adopted revised Mission and Vision statements and linked preliminary strategic plans to units. Each unit organized its own integrative mission and vision statements and stated its assumptions, goals, and aims.

The University plan was concise and easy for every University community member to comprehend. The plan’s essence can be summed in one phrase: *to achieve national recognition and eminence among public undergraduate universities in the northwest through highest quality learning experiences and to grow through improved retention, recruiting, and marketing.* Achieving this goal was the key to EOU seeking Oregon State Board of Higher Education (OHSBE) approval as Oregon’s selective undergraduate institution (December 1999).

Administration and Finance directly linked their strategic plan to budget planning.¹ The budget planning process has enabled the institution to assign priorities to its needs and plans, rationalize its budget requests for various boards and legislatures, and provide a baseline plan that can be modified easily as changes occur. The budget process has also identified how budget information may be distributed to affected institutional constituencies.

The University used the budget-checking function in FIS to alert the Budget Office to possible departmental overages. It made contact with each unit’s Dean or Director and asked that the potential budget overage be corrected.²

The University financial plan included three-year projections of major income and expenditure categories.³ Income projections were developed through a review of tuition and fee history, state appropriations, grants and contracts, and auxiliary enterprises, followed by projection of these major categories. Expenditure projections were developed through review of historical data on salaries, service and supplies, and other system obligations.

¹ See Exhibit 1.D, “EOU Budget Process” and Appendix E “EOU Budget Policies.”

² See Exhibit 1.F, “Budget Checking.”

³ See Exhibit 1.G, “Three Year Income & Expenditures”; 1.H, “98-99 EOU Budget History”; and 1.I, “Budget Summary.”

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The Capital Construction Program 1999–2005 identifies the capital projects and funding sources for capital construction and improvements approved by the OSBHE in July 1998. Long-range capital expenditure plans were updated and modified according to the University strategic plan.

Assessment of future needs and requirements

Administration and Finance researched methods and models to meet goals of empowerment and reward and developed goals to help the University to determine the empowerment level and formulation of rewards based upon performance measures. These goals include the following:

- Provide incentives and rewards for unit-level efficiencies.
- Create incentives for units that maximize resources available to the University as it pursues strategic planning priorities.
- Determine performance-based monetary rewards for individuals, driven by goals and benchmarks.

The empowerment and reward process was added to the budget plan in January 2000. This included providing the instructional and non-instructional faculty a monetary bonus during 2000 and 2001. The bonus was for increased recruitment and retention.

Administration and Finance, assisted by the OUS Internal Audit Department, developed and implemented an Operational Audit Plan that ensured compliance with governmental policies, procedures, guidelines, and reporting requirements. This provided another mechanism for reviewing budget and planning compliance. The Operational Audit process was finalized in October 2000.

In anticipation that OUS would decentralize cash management and related reporting requirements, the University developed cash management guidelines, policies, and procedures. University cash management was implemented in January 2001.

Administration and Finance has continued development of a costing model defining direct and indirect costs. This model provides the information needed to make budgetary decisions based on costs per program and per student. Data collection systems are in place to create this costing model. Administration and Finance must determine how the data need to be retrieved and reported for consistency, timeliness, and accuracy. Space allocation costing was completed in January 2000.

EOU began 1999 with its state appropriation changing from a program cost model to a new funding model directly tied to student enrollment. Prior to this, all tuition revenues were pooled centrally according to a one-fund, one-system concept. Those revenue dollars were added to the state appropriation and allocated to each of the seven OUS institutions based on program and delivery costs.

In 1999, the seven OUS institutions received general fund allocations from a new enrollment-driven model. Each institution kept the revenue generated from tuition and fees and received state allocation based on formula-driven cell values related to the level of the student and the category of instruction.⁴ The University's entire budget process now incorporates the "new" OUS Allocation Model.

Understanding that the current OUS Allocation Model only provides 60% of the University's resources, Administration and Finance has worked to identify other resource opportunities in order to provide a comprehensive and adequate institutional budget. Auxiliary enterprises, research and grants, service departments, and the University foundation are directed by strategic planning.

⁴ See Exhibit 1.K, "OUS Budget Allocation Summary."

Recommendations

Response to Interim Recommendations from the 1999 Focused Interim Report

Standard 7.C.2—Financial Management

“While managers and staff may be able to absorb extra work for a period of time, it is recommended that the University more closely examine the longer-term staff support requirements of the institution to meet increased budget planning and financial management responsibilities. This is not intended, necessarily, to mean an increase in staff, but the institution should carefully consider how to deploy staff in the most effective manner possible.”⁵

Standard 7.B.5-7—Adequacy of Financial Resources

“With essentially no operating reserves, the institution needs to carefully examine its current budget plans and projection, especially during the next few years of implementation of the new revenue sources based on enrollment. The incurring of operating deficits would make the challenge of growing even more difficult. Further, the uncertainty of the State’s enrollment based funding commitments over the next five years suggests the institution could face revenue fluctuations. It is recommended that the University develop a specific plan to increase operating reserves, which may include some reduction in the level of services, at least until the enrollment based revenue structure is more clearly known and more predictable.”⁶

Exhibits (available on campus)

- 1 1999 Focused Interim Report
- 1.D Appendix D: EOU Budget Process
- 1.E Appendix E: EOU Budget Policies
- 1.F Appendix F: Budget Checking
- 1.G Appendix G: Three Year Income and Expenditures
- 1.H Appendix H: 98-99 EOU Budget History
- 1.I Appendix I: Budget Summary
- 1.K Appendix K: OUS Budget Allocation Summary

⁵ See Recommendation Two, “Enrollment Management Committee.”

⁶ See Recommendation Two, “Enrollment, Revenue, and Expense Projections” and Standard Seven.

RECOMMENDATION ONE POLICIES AND PROCEDURES

“The committee recommends that the institution develop and disseminate policies and procedures so that operational goals can be established to measure success. Special attention should be paid to academic program requirements, student service delivery, faculty workload, and financial planning.”

Standard 2.A.3—Academic Program Requirements

Standard 3.A.3—Student Service Delivery

Standard 4.A.3—Faculty Workload

Standard 7.A.2—Financial Planning

Summary of the 2000 Focused Interim Report

The University concurred with the evaluators’ recommendation to revisit the mission statement, develop a strategic plan, and communicate more effectively to its stakeholders the policies and procedures of the institution. In January 1999, the campus community benefited from having a voice in revising the mission and vision of the institution through expanded participation in and communication about strategic planning.

1. Development of Operational Goals

EOU responded to General Recommendation One in a Focused Interim Report in 2000.¹ The report considered the interrelationship of Mission, Vision, Internal/External Assessment, Goals, and Aims with a view to clarifying institutional direction tied to budgetary planning and dynamic internal/external environments. The outcome of this endeavor was development of a campus-wide Strategic Plan during Winter and Spring 1999. Special attention was paid to building consensus among campus constituencies and aligning the aims and goals of the Strategic Plan with the newly adopted institutional Mission and Vision. The Strategic Plan was approved by the Assembly in June 1999.

AY 1999–2000 implemented the Strategic Plan throughout the institution in three key ways:

- Annual goals and aims for each Administrative Planning Unit would be reported and evaluated in regular “Annual Performance Reviews”;
- Annual budget preparation would be tied to the Strategic Plan; and
- A process of Annual Reports was created wherein each Unit would report to the lead administrator on the attainment of goals and the development of goals and aims for the next year.

Annual reviews folded into the Strategic Plan allowed for modifications of programs and administrative plans with a biennial reconsideration of the University’s Mission, Vision, Internal/External Assessments, Goals, and Aims.

¹ Exhibit 3, 2000 Focused Interim Report.

2. Development of Dissemination Practices

Since the Commission was particularly concerned about dissemination of policies and procedures, the 2000 Focused Interim Report addressed this issue in some detail to document improved channels of communication between central administration and campus-wide constituencies through the online convenience of a Faculty/Staff Handbook, a monthly campus newsletter, enhanced orientation sessions with new faculty, establishment of a President's Cabinet and President's Council, a university listserv, and a system of annual reports.²

3. Development of Policies and Procedures

Standard 2.A.3—Academic Program Requirements

“Degree and certificate programs demonstrate a coherent design; are characterized by appropriate breadth, depth, sequencing of courses, synthesis of learning, and the assessment of learning outcomes; and require the use of library and other information sources.”

In its 2000 Focused Interim Report, the institution primarily targeted the academic “assessment of learning outcomes” by taking the following steps to comply with Policy 2.2 and Standard 2.A.3:

- Developed a university assessment plan for measuring institutional mission, goals, and objectives in 1999–2000.³
- Developed and implemented a new general education program in Fall 2001.⁴
- Developed student learning outcomes and means for assessment of outcomes in each academic program in 2000, available in the online General Catalog at: <http://www.eou.edu/catalog/>.⁵
- Sought and received OSBHE approval as Oregon's selective public undergraduate university in December 1999.
- Developed the Cornerstone Program, an experiential learning model in international experience, practicum or internship, service learning, and research or creative mentorship with a faculty member.

The 1999 revised mission and vision statements and strategic planning guided all developments (<http://www.eou.edu/pres/mission.html>).

Standard 3.A.3—Student Service Delivery

“Appropriate policies and procedures for student development programs and services are established. The objectives of each operating component are compatible and support the goals of student services.”

With a particular focus on entering freshmen, the institution seized the opportunity to develop

² See Exhibit 3, “Dissemination” 4-6.

³ See Exhibit 3.E, “University Assessment Plan.”

⁴ See Exhibit 3.F, “General Education Mission and Outcomes” and Exhibit 4.G, “General Education Program.”

⁵ See Exhibit 4.F, “Academic Program Assessment Plans.”

Recommendations

policies and procedures for improving student service in the areas of admissions, academic curriculum, financial aid disbursement, and athletics.

1. Admissions

The Admissions Office developed new goals and aims to aid in the recruitment and retention of freshmen. Recruitment, retention, and enrollment strategies in the Strategic Plan for Student Affairs emphasized recruitment of targeted populations, specifically American Indian, Alaskan Native, Hispanic, and other traditionally underrepresented minorities.⁶ Refinements to the Freshman Orientation program included activities focused on adaptation to campus life and a three-day EasTrek experience in the region and nearby urban centers. See Standard Three for further elaboration.

In Spring 2000, a taskforce study of a “one-stop-center” for student services was conducted and recommendations made for a threefold phase-in of changes.⁷ Phase One, completed in Summer 2000, consolidated student services to the first floor of Inlow Hall by moving the centralized Advising office from the second floor to the first. Other spatial rearrangements included:

- Moving Career Services from the basement of the library to the first floor of Inlow Hall;
- Moving Financial Aid Services from an adjunct merger with Admissions to closer proximity with the Cashier’s Office and the Business and Finance Office.

Phases Two and Three were not completed due to insufficient institutional resources to cross-train and staff a “one-stop-center” and renovate Inlow Theater into Presidential offices.

2. Academic Curriculum

The institution’s “focus on freshmen” resulted in development of general education-sponsored Freshman Year Interrogatory courses to enhance student success in interdisciplinary learning. Service learning opportunities were centralized in the Cornerstone Program, where students have access to experiential learning opportunities in the community, but also in other cornerstone areas: international study, practicum or internship, and one-on-one research or other creative undertaking with a faculty member. A coordinator of the Cornerstone Program was appointed in Fall 2002 to oversee student progress through cornerstone experiences, and in 2003 the position was opened to an application process through a campus-wide search. See Standard Two for further elaboration of the Cornerstone program.

3. Financial Aid

Two external reviews during 1999-2000 resulted in modifying award dates and processes, handling of inquiries, and delivering on-site financial aid services to distance students.

4. Athletics

Review of funding sources for intercollegiate athletics salaries and other non-instructional athletics costs led to clearer separation of student fees, general funds, revenues and receipts, and private donations.

⁶ See Exhibit 3.A, “Strategic Planning Background Documents.”

⁷ See Exhibit 5, “One-Stop Shopping Committee Report, August 2000.”

Standard 4.A.3—Faculty Workload

“Faculty workloads reflect the mission and goals of the institution and the talents and competencies of the faculty, allowing sufficient time and support for professional growth and renewal.”

The institution addressed two areas of faculty concern regarding *equity of workload* and *feasibility of sabbatical leave* for “professional growth and renewal.”

1. Workload. A faculty task force in the School of Arts and Sciences reviewed policy on equity of workload in 1998–99. The existence of a policy was confirmed and published in the *Faculty/Staff Handbook*, though the task force never reached consensus on the equity of its implementation across the disciplines. (<http://www.eou.edu/academic/handbook/SECTIONS/7B3.HTM>).

The Commission found that “the policy is appropriate for the mission of the University” because it permits “flexibility among different disciplines and for specific individual cases.”⁸

2. Sabbatical Leave. The OUS system policy that governs the level of sabbatical support (60% for a full-year sabbatical) together with a stipulation that sabbaticants leave La Grande during sabbatical proved problematic for faculty growth and renewal in their professions. In 2000, reexamination and improvement of the sabbatical leave policy provided for a sabbatical incentive fund to offset the low level of support for a three-term sabbatical. (See revised language for sabbatical leave at <http://www.eou.edu/academic/handbook/SECTIONS/7CSABAT.HTM>).
3. The Office of Research and Sponsored Programs. In addition to the sabbatical incentive fund, EOU established an Office of Research and Sponsored Programs (ORSP) to help faculty locate extramural funding for sabbatical leave. The sabbatical incentive fund combined with ORSP has resulted in renewed interest in and feasibility of sabbatical leave. (See ORSP website at <http://www.eou.edu/orsp/>).
4. Faculty Scholars Program. In 2000, the Summer Stipend Program was reviewed, renamed the Faculty Scholars Program, and the criteria revised accordingly. The criteria for selection are clearly delineated, but the process of selection is currently undergoing revision.⁹

Standard 7.A.2—Financial Planning

“The institution demonstrates that financial planning for the future is a strategically guided process. This planning includes a minimum of a three-year projection of major categories of income, specific plans for major categories of expenditures, and plans for the management of capital revenue and expenditures. Short and long-range capital budgets reflect the institution’s goals and objectives and relate to the plans for physical facilities and acquisition of equipment.”

⁸ See Exhibit 3, “Commission Response.” The Commission’s concerns about overload are further addressed in Recommendation Six.

⁹ See <http://www2.eou.edu/%7Eorsp/orsphome.html> for current Faculty Scholars Program criteria; also see Standard Four for changes in process for granting the awards.

Recommendations

The 2000 Focused Interim Report addresses Standard 7, 7.A, and 7.A.2 and builds on progress made since the 1999 Focused Interim Report.¹⁰

- Development of budget and planning processes at the unit level;
 - Development of projection tools based on program-level student credit hour revenues/expenditures;
 - Procurement of a Small University funding base subsidy through the Oregon University System Resource Allocation Model; and
 - Development of a Capital Budget Plan for 2001–03, 2003–05, and 2005–07.
- The Administration and Finance Unit has continued to work towards goals stated in the 1999 Focused Interim Report.¹¹
- Provide incentives for unit-level efficiencies;
 - Create incentives through strategic planning priorities for units that increase resources available to the University;
 - Determine goals and benchmarks for performance-driven monetary rewards to individuals;
 - Develop a comprehensive Facilities Master Plan to establish a “University District” tied to the strategic planning process and sensitive to future growth; and
 - Combine the functions of the Budget Committee and the Strategic Planning Committee to form an integrated Budget and Planning Committee.

Exhibits

(available on campus)

1	1999 Focused Interim Report
3	2000 Focused Interim Report
3.A	Appendix A: Strategic Planning Background Documents
3.E	Appendix E: University Assessment Plan
3.F	Appendix F: General Education Mission and Outcomes
4	2001 Focused Interim Report
4.G	Appendix G: General Education Program
5	One-Stop Shopping Committee Report, August 2000

¹⁰ See Exhibit 1 and sections pertaining to Standard Seven in Exhibit 3.

¹¹ See Exhibit 3, “Financial Planning” 12-13.

RECOMMENDATION SIX OVERLOAD POLICY

“In order to use faculty time for quality instruction and support professional growth, the committee recommends that the institution develop and implement a policy for overload teaching.”

Standard 4.A.3—Policy on Overload Teaching

Summary of the 2000 Focused Interim Report

The Commission’s concerns about overload teaching and its potential impact on the quality of teaching, as well as the professional development and scholarly activities of the faculty, were carefully considered.

EOU’s long-standing mission commitment to provide degree programs to people where they are has resulted in quality programs delivered by eighty-five to ninety percent of regular campus faculty. Initially, additional salary incentives to offset below-average salary compensation accounted for high faculty participation in distance programs. At the time, a system of dean and provost approval for overload teaching generally worked to protect quality on-campus teaching performance against mediocrity that could result from too much overload teaching.

1. Development of Overload Policy

At the recommendation of the Commission, in AY 1998–99 EOU developed and adopted a “Teaching Overload Limits” policy consistent with the OUS policy on outside activity and related compensation (<http://www.eou.edu/academic/handbook/SECTIONS/7BOVERLO.HTM>).

2. Implementation

1999–2001 was designated as the phase-in period for the following transition strategies:

- Allowance for exceptions during the phase-in period;
- FTE partnerships between DDE and academic programs to create full-time, residential faculty positions with in-load teaching responsibilities for DDE; and
- Restructuring of teaching assignments and FTE in Philosophy to address off-campus demand for general education courses in this area.

DDE has monitored compliance with the policy and reports to the Provost.

Response to Interim Recommendation from the 2000 Focused Interim Report

Standard 4.A.3—Overload Policy¹

“Additional thought should be given to the implementation of the overload policy. Faculty whose regular term assignments are already large in terms of student credit hour generation may be committed to even larger assignments in overload. As was noted above, the policy in and of itself is clear and logical. It is the implementation of that policy which still leaves some concerns.”

¹ See Exhibit 4, Interim Recommendation Two “Overload.”

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At this reporting, EOU is two years beyond the stated transition phase, but implementation of the policy has proven problematic during a time of unprecedented growth in DDE enrollments (over 20% per year 1998-2002) and unforeseen shortfalls in state funding to higher education. Although a strategic goal to grow enrollments fulfills the institutional mission to serve students at a distance, the institution is currently implementing the “FTE partnership” with DDE in-load responsibilities and reviewing recent exceptions to the overload policy.

- *Exceptions to Limitations on Overload.* DDE and the School Deans monitor compliance with implementation of the Overload Policy. Faculty currently approved for exceptions to overload teaching have been approved by appropriate deans and the Provost.¹
- *FTE Partnerships with DDE*—DDE helped to support the FTE for an on-campus Gender Studies coordinator from 2000-2003. In Spring 2003 it was determined that enrollments from distance education students in the Gender Studies courses offered via asynchronous methods were not at a level to sustain such support, and the partnership was terminated. DDE and Psychology formed an FTE partnership in Spring 2003.
- *Restructuring FTE in Philosophy*—the “Exception to Limitations on Overload” policy is currently being addressed.

Exhibits (available on campus)

- 4 Interim Recommendation Two: Overload
Plans and Strategies for Implementing Overload Limitation
2001 Letter to Harold Dengerink

¹ See Exhibit 4, “Plans and Strategies for Implementing Overload Limitation” and “Approved Exceptions to Limitation on Teaching Overload AY 2001–02” in the 2001 letter to Harold Dengerink, Oct 12, 2001. Also included are approved exceptions AY 2002-2003.

RECOMMENDATION TWO STRATEGIC PLANNING AND EVALUATION

“The committee recommends that Eastern Oregon University immediately address the requirements for institutional planning and evaluation required by Standard 1B. A long-range strategic plan will provide an action agenda based on mission. Enrollment, revenue and expense projections are critical to organizational decision-making.”

Standard 1B—Institutional Planning and Effectiveness

Summary of the 2001 Focused Interim Report

EOU responded thoughtfully and decisively to the Commission’s recommendation to develop and implement a Strategic Planning Process. The process attends to long-term strategic planning tied to enrollment, revenue, and expense projections.

1. Development of a Strategic Planning Process

The Strategic Planning Committee began its work in January 1999, when then President Phillip Creighton convened a planning meeting to address the following:

- **Completeness.** Consideration of mission, vision, assessments of the external environment, evaluations of internal strengths and opportunities, and formation of goals, aims, responsibilities, and time lines.
- **Comprehensiveness.** Inclusion of all University units—program and administrative—in the Strategic Planning Process.
- **Inclusiveness.** Broad representation across the University and from academic partners, the local community, and regional advisory boards.
- **Bottom up.** The University plan was derived from program and administrative unit plans.

The completeness, comprehensiveness, inclusiveness, and bottom-up procedures used to derive institutional strategic goals were designed to create a coherent system of annual reporting consistent with Mission direction. (Standard One, which talks about a bottom-up approach centered on student experiential learning, focuses on the assessment dimension of strategic planning, as opposed to the program and administrative procedures for annual reporting discussed above).

The strategic plan embedded routine evaluation within program and administrative unit “aims”—targets that are measurable and fulfill the aspirations and direction provided by the mission, vision, and goals developed at all levels of operational and academic planning. Within six months (January–June 1999), review and revision of the University mission and vision statements—detailed in Recommendation Three—was begun and concluded by scaffolding program and unit plans towards a University Strategic Plan.¹

Initial strategic priorities as stated in the Eastern Oregon University 1999 Strategic Plan² were to aim for top national ranking as a small, public undergraduate university in the Northwest within five years, and to

¹ See Exhibit 6, Strategic Planning: 1999. See also Exhibit 4.A “Strategic Planning Background Documents” and 4.B “EOU 1999 Strategic Plan.”

² See Appendix A, “Eastern Oregon University: 1999 Strategic Goals.”

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grow 5% per year, with the eventual aim of having the highest graduation and retention rates in the OUS. The following strategic goals were developed from program and unit strategic plans to ground these aims.

- *Goal 1: Provide high quality undergraduate learning experiences that are responsive to needs on- and off-campus.* Through attention to external and internal assessments of environment and opportunity, EOU has responded to increased demand for program offerings through the Division of Distance Education, where enrollment growth exceeded 20% per year since 1998-2002. Also, development of new degree programs in Biochemistry, Business Administration, Engineering, and Media Arts have been responsive to external market demands.
- *Goal 2: Effectively recruit motivated, prepared and responsible, qualified new students.* Admissions standards, the highest in the OUS system since the mid-nineties, have resulted in a more selective admissions process that gained the institution status as “Oregon’s selective undergraduate institution” at the State Board of Higher Education meeting in December 1999. All-time high retention rates speak to more motivated and better-prepared students entering the University.
- *Goal 3: Provide services and programs which assist students in completing their programs of study, including numerous, varied, and diversified opportunities for students to become involved in campus life.* New approaches to student orientation, the Cornerstone Experiences, and the annual student symposium “Sharing the Learning” have increased student engagement in learning and campus life and meet OUS accountability measures.
- *Goal 4: Internationalize the undergraduate experience.* Students have increased opportunities to study abroad and participate in the international component of the Cornerstone Experience. Recruitment of international students, especially an established Micronesian recruitment program, gives on-campus students from the United States frequent opportunities to interact with international students.
- *Goal 5: Increase the cultural diversity of student body.* International recruitment and retention has helped infuse EOU’s cultural life with diverse experiences and perspectives. The University maintains its commitment to serving native and other underserved populations through the Native American program. (See detailed enrollment reports at <http://www2.eou.edu/infosys/rpt/>).
- *Goal 6: Improve faculty recruitment and the support of faculty.* The University complies with AA/EEO procedures for recruiting faculty from national search pools. The Faculty Scholars Program and Office of Research and Sponsored Programs support faculty in the scholarship of research. In 2002, the University co-sponsored (with the Oregon Writing Project) a successful Summer Teaching Institute for College Faculty. The initiative did not continue due to lack of funds.
- *Goal 7: Provide appropriate facilities and related services to insure a healthy and safe environment for living and for learning.* The Facilities and Planning office has been successful in developing and implementing a Master Plan for campus facilities, residential housing, landscaping, and wheelchair access. A *Facilities Assessment* has been completed for the renovation of Hunt Hall, a new residence hall, and the Grand Staircase. The buildings were updated for Americans with Disabilities Act (ADA) compliance requirements. A Stage Production Coordinator was hired to oversee the stage and ceramics in Loso Hall areas, and formal policies for these areas have been drafted by the Environmental Compliance contractor (Tim Jarvis). The Safety Officers have all received training and the campus is patrolled 24 hours per day, 7 days per week. The security office produces incident reports, which are reviewed by the Vice Presidents for Student Affairs and Business and Finance. A fire marshal report was filed and all issues have been complied with. See Standard Eight.
- *Goal 8: Improve marketing.* In 2000, the University created a centralized support structure—University Advancement—for advancing the institution and managing media, fundraising, legislative affairs, alumni and foundation relations, and marketing as a single unit. See Standard Nine for further elaboration of policies associated with Policy 3.1 and Standard 9.A.3.

Recommendations

- *Goal 9: Increase Development fund raising.* In 2000, the University created the Office of University Advancement and appointed an Assistant Vice President for University Advancement to focus on development and fundraising efforts. The Office has been successful in securing nearly \$29 million in funds to support the strategic goals of the University. Development and fundraising efforts have resulted in a 150 percent increase in private funds raised through the EOU Foundation.
- *Goal 10: As the University grows, reduce overhead while maintaining administrative, physical plant, academic, and student support services at high levels of quality.* During 1999–2000 the University reviewed expenses for administrative areas and identified targeted reductions to areas that did not seem to fit with the EOU mission and strategic goals, such as the Regional Services Institute. Because “economies of scale” savings have helped hold costs down, the University has made only modest increases to administrative areas as the campus has grown.

2. Implementation of the Strategic Plan

As noted in the 2001 Focused Interim Report, the approach to institutionalizing the Strategic Plan was threefold:

1. Beginning in Spring 1999, the strategic planning goals and aims of a unit fell under the purview of the administrator, becoming part of the annual goals of that administrator and reported on and evaluated as regular annual performance reviews.
2. The FY 2000–01 budget was tied to strategic planning. Administrative units were responsible for preparing scenarios of budget increases and decreases along with explanations and rationales that identified priorities consistent with program and university strategic goals.
3. A process of annual reports to appropriate lead administrators was implemented. Reports focused on accomplishments of strategic goals and aims and proposed changes for the coming year, thus guiding resource allocations towards improvement of instructional programs and operational services.

The annual reporting process is ongoing and a routine part of the institutionalized strategic planning process.³

3. Enrollment, Revenue, and Expense Projections

Enrollment, revenue, and expense projections have been fully integrated into EOU’s strategic planning processes. The University responded to the Commission’s recommendation by incorporating budget planning into organizational decision-making in a number of ways.

1. EOU developed an in-house enrollment projection model, treated in more detail at the end of Recommendation Two (“Further Recommendations from Focused Interim Report 2000”). This model projected biennial revenues from tuition, fees, and state support and has a special function to distinguish between distance education and on-campus enrollments, something the OUS model does not do. The model allowed the institution to successfully prepare an accurate 2001–2003 biennial budget and make proactive course scheduling decisions.⁴
2. The University’s Strategic Planning Committee and the Budget Committee were integrated into one single committee in 2001, formally becoming the Budget and Planning Committee. For continuity, the Budget Committee requested that the members in 2001 be retained for the 2002 year also. The Budget

³ See Exhibits 7 and 8 for Strategic Planning Annual Reports 2000-2002. See Exhibit 13 for 2002-2003 Annual Reports.

⁴ See Exhibit 4, Interim Recommendation One “Enrollment Management.”

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and Planning Committee has met regularly since 1999, either quarterly or monthly depending on the schedules of the members and the necessity. The committee acts as a communication conduit for the campus. Members are asked to communicate agenda items to their units and the Chair presents information to the University Assembly as needed. Notes and handouts are placed on reserve in the Library after each meeting. The Budget and Planning Committee is currently a standing committee within the institution's governance structure with broad representation from across the campus (<http://www.eou.edu/assembly/constitution/SECTIONS/11BYLAWS.HTM#BPC>).

3. In 2001 EOU developed a revenue/cost model to provide analyses at the level of academic program or discipline. The original revenue-cost model was helpful in providing a base for the planning process, but the level of detail and the level to which the costs were applied was too detailed. The original model was applied to the course level; however, a new model is currently being planned that looks at the costs at a higher level.⁵
4. As stated in the 2001 Focused Interim Report, the institution has shifted from "cost-based" to "revenue-based" thinking. In Academic Affairs, program level decisions are guided by strategic planning priorities and revenue considerations.⁶ Any budget implications are presented to the Budget and Planning Committee for comments and questions. If necessary, individual meetings are scheduled with the business and finance staff to discuss details regarding budget, expenses, and long-term planning. The appropriate Vice President then presents the initiatives to the Executive Cabinet. The Budget Officer then communicates the final decision to the Budget and Planning Committee. In 2003, the Provost drafted new forms for EPCC requests for new courses, changes in existing courses, and new programs that identify impact on institutional revenues.⁷

In 2001, the institution's Strategic Planning Process made good use of data systems for projecting enrollments and revenues more accurately than OUS projections; the revenue/cost model initially translated well from the institution to the program level⁸; and new procedures for integrating budgeting and planning through the Budget and Planning Committee has helped balance decision-making against strategic planning priorities.

As noted in the Commission's response, the strategic planning process has worked well during a period of enrollment growth primarily in the Division of Distance Education.

Response to Interim Recommendations from the 2000 Focused Interim Report

Standard 7.A.2—Financial Planning

"While the planning process has included significant strides in the area of budgeting and long-term fiscal management, the University still has work to do in developing an integrated enrollment projection/management and budget process. While the University may lack the resources to designate an individual responsible for enrollment management (projections and retention), there are several models which employ committees and task forces which can be modified to fit the specific needs of the University."

⁵ Summary of the revenue/cost model may be found in Recommendation Seven; see also Standard One and Standard Seven for updates on implementation of the model.

⁶ See Exhibit 4.D "Budget/Planning Approach for Academic Affairs."

⁷ See Appendix B, Draft EPCC Action Request Forms.

⁸ See Standard One and Standard Seven for updates on the revenue/cost model.

Recommendations

The University responded to this helpful recommendation through 1) development and implementation of an enrollment management model and 2) establishment and engagement of an enrollment management committee.

1) Enrollment Management Model

The model was built with EOU management and planning needs in mind. The model has allowed the University to make assumptions about admission and retention rates, using historical figures as a base. Separate coefficients, policy variables, and results have been maintained for on-campus and off-campus enrollments. The model also brings together both the on- and off-campus admission and retention patterns in a combined set of projections. The model, which allows predictive results to be refined by actual numbers, further allows for comparisons between predicted and actual values in order for the institution to understand discrepancies.⁹

2) Enrollment Management Committee

An Enrollment Management Committee was established in response to an enrollment crisis in Fall 1998. The committee included campus-wide representation (25 members) and while it identified important initiatives for the University to pursue in improved retention and recruitment, the committee was not well suited to the more task-oriented need to project enrollments. Consequently, the first committee was dissolved and a new, smaller committee convened in 2001-2002, chaired by the Vice President for Student Affairs, and including in its membership the Provost and Vice President for Academic Affairs, the Vice President for Administration and Finance, the Director of Admissions, the Financial Aid Director, and a member of the teaching faculty. The Committee has met to contribute management expertise to enrollment projections and to discuss discrepancies in projections between OUS Institutional Research and EOU predictions. The combined projection tools and management approach have improved the University's capacity to plan in a strategic and effective manner.¹⁰

Response to the Interim Recommendation from the 2001 Focused Interim Report

Standard 4.A.4—Improve Faculty Salaries

“It is recommended that EOU take whatever steps it can to improve faculty salaries.”

See Standard Four for the University's actions leading to improved faculty salaries.

Appendix

- A Eastern Oregon University: 1999 Strategic Goals
- B Draft EPCC Action Request Forms

Exhibits (available on campus)

- 4 Interim Recommendation One: Enrollment Management
- 4.A Strategic Planning Background Documents
- 4.B EOU 1999 Strategic Plan
- 4.D Budget/Planning Approach for Academic Affairs
- 6 Strategic Planning: 1999

⁹ See Exhibit 4, Interim Recommendation One “Enrollment Management.”

¹⁰ See Exhibit 4, Interim Recommendation One “Enrollment Management” for detailed discussion, 39-42.

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7	Strategic Planning: Budget and Planning Annual Reports 2000-2002
8	Strategic Planning: Academic and Student Affairs Annual Reports 2000-2002
13	Strategic Planning: Annual Reports 2002–2003

RECOMMENDATION THREE MISSION

“Given the opportunities presented to the institution, the committee recommends that the mission statement be revisited for scope, clarity and emphasis, focusing on how students are to be served and in what geographic region(s). In reexamination, the resources available to implement mission objectives must be considered (Standard 1.A).”

Standard 1.A—Mission and Goals

Summary of the 2001 Focused Interim Report

EOU’s revised mission and vision were approved at OSBHE in December 1999. The 2001 Focused Interim Report details for the Commission EOU’s process of mission revision.¹ In brief, by 1998 the institution had clearly outgrown its decade-old mission objectives to serve a single geographic region, as noted by the Commission. A new tuition-driven funding model for higher education adopted by the State Board in 1998 added some urgency for the institution to revisit and revise its mission appeal to constituencies beyond the geographic region of eastern Oregon.

The Commission’s Recommendation Three also coincided with the investiture of a new President, making it timely and propitious to broaden the scope and clarify the mission direction of the institution in January 1999. This was done in the context of establishing a Strategic Planning Process at the institution, summarized in Recommendation Two.

1. Revising the Mission and Vision

With service to students always at the center of institutional planning, EOU embarked on a six-month planning process led by a broadly representative Strategic Planning Committee. The result was a strategic plan that grew from unit plans to an institutional plan, and that included external/internal assessments of the environment and revision of the mission and vision statements that would guide budgetary decision making in the future.

One of the strategic themes around which mission revision revolved was *growth* to reduce overhead. Targeted areas for growth were in enrollment, in tuition revenue, and in improved recruitment and retention of students. These strategic priorities led to revision of the mission in terms of its scope and clarity of purpose.

(1998) Eastern Oregon University’s mission is to serve the educational, social, cultural and economic needs of the ten eastern-most counties of Oregon through high quality programs of instruction, research and service.

(Revised 1999) Eastern Oregon University is an exemplary student-centered institution. We are dedicated to serving Oregon and beyond through intellectually challenging and personalized programs of instruction, research, and service. We have a special commitment to the educational, social, cultural, and economic needs of eastern Oregon.

¹ See Exhibit 4, Recommendation Three: Mission.

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Broadening the appeal of the mission to provide quality programs beyond the geographic region of eastern Oregon was a first step in growing enrollments. A second step was to tailor the vision statement to address growth of the student learner through quality education and through a broadened sense of place (<http://www.eou.edu/pres/mission.html>).

2. Benefits of Revising Mission and Vision

The Preamble to the revised Mission and Vision approved at OSBHE in December 1999 declared EOU “Oregon’s selective undergraduate institution,” and this status has allowed the institution a distinctive niche and a clear path towards meeting its strategic goals. In fewer than three years, EOU was able to report the following benefits of having a clear mission message to deliver to customers and influencers:

- Top tier ranking in *US News & World Report* and recognition in *Cool Colleges* and *Kaplan/Newsweek College Catalog 2002*;
- Over 20% growth in distance education programs per year, 1999-2001;
- \$30M+ fundraising effort from every county in the region to fund a new Science Center on EOU’s campus;
- An Honors Program² that aids recruitment efforts in a competitive market;
- Increased retention rates (<http://www.ous.edu/aca/performance/Persistence.htm>); and
- Steady on-campus enrollment increases (<http://www.eou.edu/~ir>).

3. Supporting Growth

An emphasis on growth has required the institution to plan for future residential growth in facilities, student services, and faculty. A new residence hall, Alikut, completed in 1999, and the new Science Center, currently under construction, addressed necessary expansions in residential living and learning facilities to support growth. Legislative funding was secured for two new residence halls and planning begun for one, to be completed in the 2003-2005 biennium. An “Integrated Services Building” was completed recently to support state and local agencies and to provide additional office and classroom facilities for future institutional expansion.³

Faculty and Administrative Faculty positions were added in all academic areas and in strategic student services areas—Admissions, Academic Advising, Facilities Services, Pierce Library, Counseling, Native American Program, Business and Finance, Computing and Telecommunications, University Advancement. In directing EOU’s mission towards growth, EOU has planned for it in appropriate and forward-looking ways.

Exhibit (available on campus)

4 Recommendation Three: Mission, in 2001 Focused Interim Report

² See Standard Two.

³ See Standard Eight.

RECOMMENDATION FOUR ASSESSMENT--EDUCATION

“The Committee recommends that the university develop and implement an institution-wide plan for regular and continuous assessment of academic programs, in terms of clearly identified and published student learning outcomes, as well as measures to demonstrate that the improvement of teaching and learning is the result of these activities (Policy 2.2 on Educational Assessment).”

Policy 2.2—Assessment—Education

Summary of the 2001 Focused Interim Report

In recent years, EOU has developed ongoing strategic and institutional assessment planning in every area of the University. Through these efforts, EOU has sought to foster a university-wide culture of planning and assessment guided by mission and dedicated to the improvement of educational effectiveness.

During AY 1998–99, EOU formalized an Institutional Assessment Plan designed to:

- Integrate existing assessment methods with a new strategic planning process;
- Identify program areas where outcomes and assessment needed development; and
- Replace 5-year program reviews with annual reporting *vis`a vis* strategic planning to optimize responsive improvements.

AY 1999–2000 continued to fill in the Institutional Assessment grid, with specific attention to:

- Developing academic program outcomes and assessment methods for publication in the *2000-2002 General Catalog*;
- Developing outcomes for a new General Education program, approved at Assembly in June 2000; and
- Conducting, analyzing, and using routine assessment procedures in strategic planning decisions.

AY 2000–01 continued progress made the previous year by:

- Refining procedures for implementing assessment measurement activities at the program level;
- Approving an assessment plan for the new General Education program at Assembly in June 2001; and
- Developing two mission-specific OUS performance indicators related to percentage of entering first year students with high school GPAs of 3.75 or better and average number of graduating seniors completing the Cornerstone Experiences.

In preparing for the 2001 Focused Interim Report, EOU identified several measures that helped the institution routinely assess educational effectiveness.¹

¹ See Appendix C “Institutional Assessment Plan”; this can also be accessed at the following address: <http://www.eou.edu/academic/documents/plan/AssessmentPlan.htm>.

Table 4.1 Institutional Assessment Grid

Plan Component	Schedule	"Effectiveness" Level/Type Addressed			Responsibility	Means of Affecting/Effecting Decision Making
		Other than Instructional				
Institutional	Instructional					
1. Strategic Planning Process	Biennial review of goals/aims; annual review of accomplishments	X	X	X	All line personnel responsible for fully involving their units	Primarily Strategic Planning and Budgeting Process; also annual personnel evaluation process for line administrators and administrative faculty support personnel
2. Educational Assessment Plans	Outcomes and assessment methods in place for Spring, 2000 publication of <i>General Catalog</i> . Complete plans developed and approved AY 2000-01; operate annually		X		Provost/Deans/Programs	Strategic planning process and program/school curriculum review/design
3. Assessment plans for other than educational units	Developed and approved AY 2000-01; operate annually			X	Vice president/director	Strategic planning process and ongoing program management procedures and personnel evaluation procedures.
4. General Education	Under development for implementation Fall, 2001		X		Under development	
5. Five year program reviews	No longer required					
6. Instructional faculty personnel first, second, third-year reviews; merit, promotion, tenure, and post tenure reviews	Unchanged		X		Deans and School Personnel Committees; Assembly Personnel Committee, Provost, President	All reviews address four criteria central to mission; decisions on merit, promotion, tenure, retention, professional development also are relevant
7. Academic Support Faculty annual reviews, merit, step advancement reviews, triennial reviews of administrative leaders	Unchanged			X	President, provost, vice presidents, directors.	Strategic plan aims addressed in annual goals; personnel decisions (step advancement, etc) are other means.
8. OUS Performance Indicators	Annual	X			OUS and Institutional Research and Planning	Strategic planning; OUS funding of the institution; presidential evaluations
9. Student satisfaction inventory	Biennial	X	X	X	Student Affairs/Institutional Research and Planning	Strategic planning; educational assessment plan; assessment plans of other units.
10. Course reaction surveys	Every course, every term		X		Instructional faculty	Personnel processes
11. Student survey of satisfaction with advising	Annual		X		Academic Services Director	Strategic planning process consideration of approaches to advising; personnel processes

In sum, the 2001 Focused Interim Report presented the Institutional Assessment Plan as a coherent grid for locating several assessment activities routinely practiced at the institution. Key areas of the grid involved two monumental undertakings achieved over a one-to-two year period: 1) redesign of the General Education program with clearly stated learning outcomes and means for assessment, and 2) development of program-specific outcomes and assessments for publication in the *2000–2002 General Catalog*. The General Education Assessment Plan was approved at Assembly in 2001. The development

Recommendations

phase of the General Education Program officially concluded in Winter 2003, with pilot assessments of the Freshmen Year Interrogatories (FYIs) and General Education curriculum beginning in 2002–2003.²

It is worth noting that the Institutional Assessment Plan served to jump-start campus-wide attention to assessment in the short term. To nurture and sustain a culture of assessment over the long term, however, EOU needs to gain faculty and staff buy-in and to develop a coherent systemic feedback loop of reporting and analysis that is both meaningful and useful to academic and administrative units alike. Standards One and Two elaborate the University's current and future plans for engraining a culture of assessment that leads to and follows from evidence-based educational effectiveness.

Appendix

C Institutional Assessment Plan

² See Standard Two.

RECOMMENDATION FIVE GENERAL EDUCATION REVIEW

“The General Education program should be reviewed thoroughly in light of Policy 2.1 on General Education, with special attention to providing a clear and coherent rationale for general education, and to the standards requiring specification of the competencies, outcomes and measures by which the program’s effectiveness will be assessed.”

Policy 2.1, Standard 2.B—General Education Review

Summary of the 2001 Focused Interim Report

In 1998, the Evaluation Committee recommended that the General Education program should be thoroughly reviewed. At the time of the 1998 reaccreditation review, EOU’s approach to general education was that of a breadth requirement. The program was deficient in that the rationale upon which the categories were based was not published and depended solely upon the Writing Proficiency Examination as the only means for assessing achievement of critical thinking and communication outcomes.

Assisted by the recommendations and insights of the evaluators, EOU has aligned the General Education program’s rationale, outcomes, and assessments with the University’s Strategic Plan.

Rather than simply review, improve, and publish the rationale for the old general education program and expand assessment of its effectiveness, faculty elected to develop a new program of general education. A thorough review of general education began in Spring 1999 with the formation of an *ad hoc* committee charged to develop a new general education program. The original committee was comprised of faculty, administration, and campus support staff. The committee evaluated the needs of the University and researched general education programs at selected institutions across the country, arranging consultative visits from faculty involved with innovative general education programs at other universities. In Spring 2000 the committee became an appointed faculty committee of the University’s Assembly.¹

Mission and Outcomes

A rationale was developed and expressed in the form of a mission statement. Associated student outcomes for the general education program guided definition of a coherent program. Both Mission and Outcomes were revised through a campus-wide process of meetings and forums. In Spring 2000, EOU’s Assembly endorsed the mission and outcome statements for general education.

The Mission of the General Education Program at Eastern Oregon University “challenges students to become critical, creative thinkers and engaged, knowledgeable citizens, open to new ways of looking at the world.”

¹ See Exhibit 9.A.1, 9.A.2, and 9.B, General Education Discussions 1999-2001 and 2001-2003.

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The overall outcome areas for general education are *Communication and Critical Thinking*, *General Knowledge*, and *Reflections and Perspectives*.

- *Communication and Critical Thinking* was subdivided into Communication, Critical Thinking and Problem Solving, and Quantitative Reasoning.
- *General Knowledge* was subdivided into Study of Aesthetics and Humanities; Study of the Natural World; Study of Human Behavior; Study of Arts and Creative Process; and Study of Logic, Language, and Culture.
- *Reflections and Perspectives* sought to enrich students by providing experience that would increase their Global Perspective, their Community Perspective, and their Individual Perspective. The Individual Perspective was further refined to include Values, Reflection, and Heartiness.

In the organization of outcomes and their logical connection to the explicit general education mission statement, the University believes it has developed a coherent program of general education with a clear rationale. This mission and the general education outcomes became a part of published descriptions of the program of general education in the 2000–2002 *General Catalog*.²

Outcomes and Assessment

In 2001, faculty began revising syllabi to support the mission of general education, identifying which categories were appropriate, and aligning assessment for their classes with the new general education outcomes.³

One unique feature of the general education revision was the creation of a special interdisciplinary program for new freshman. This Freshman Year Interrogatory (FYI) program was pilot tested for a year and a half. Although full implementation and integration into the general education program will take more time, it has been a program enthusiastically supported by involved faculty and student participants. The program features faculty teams, student mentors, and flexible category designation of credits. To date, nine courses have been offered.

In Spring 2001, the Provost appointed a faculty member as General Education Coordinator. This faculty member had served for the previous two years as the Chair of the General Education Committee. At a one-third FTE position, the Coordinator was in charge of the continued progress and evaluation of the general education program. The Coordinator was asked to establish a budget for the program, which for 2001–2002 was \$131,000.

The Coordinator position was eliminated in 2003 and the function of the committee shifted from reform to assessment. Full implementation of the general education assessment phase will require institutional commitment. EOU has been investigating a portfolio system. Many faculty who view a portfolio system as involving too much uncompensated work, however, did not endorse portfolios.

Simultaneous with General Education reform, the President established new initiatives in community service learning, international experiences, undergraduate research, and internship / practica—the

² See Appendix D General Education Outcomes (from online catalog http://www.eou.edu/catalog/gradrequire_new.html).

³ See Exhibit 10.A General Education Committee Minutes and Course Approvals, 1999-2003; and Exhibit 10.B General Education Course Syllabi, 2001-2003.

Recommendations

“Cornerstone Experiences.” As this model has emerged, it is clear that its outcomes align with the General Education category of “Reflections and Perspectives.”⁴

Response to Further Recommendations from 2000 Focused Interim Report

Standard 2.A.3—General Education Assessment

“While the University is only now completing the process of reevaluating the general education component of the curriculum, this more than anything else determines the character of the institution, especially for a University whose focus is particularly on undergraduate education. Consequently, the University is encouraged to continue in its revision of the general education curriculum with objectives, expected outcomes, and assessment of those outcomes. Moreover the general education curriculum should provide a coherent design for the rest of the University’s curricula.”

The development phase of EOU’s new General Education Program began in May 2000 and concluded in Winter 2003. Spring 2003 marked the beginning of a pilot assessment phase in a number of general education courses.

Revision of the General Education Program allowed faculty to revisit the liberal arts mission of the university and to experiment with fresh approaches to pedagogy that focused on student learning outcomes in the areas of critical and creative thinking, engaged and knowledgeable citizenship, and service through action and research (http://www.eou.edu/catalog/gradrequire_new.html). This sharpening of the General Education mission is guiding the institution

- To further refine its mission statement and core values as a public liberal arts university⁵;
- To implement a university-wide assessment plan around coherent program designs tied to liberal arts mission, core values, and strategic planning⁶; and
- To inaugurate the assessment phase of the new General Education program with a view to recommending actions for further improvements.⁷

Tangible outcomes of an institutional commitment to the new General Education program include development of interdisciplinary Freshman Year Interrogatory courses (FYIs) and linked courses, further developed in Standard Two.

Appendix

D General Education Outcomes

⁴ See Standard Two for elaboration of the Cornerstone Experiences and current / future assessment goals in General Education.

⁵ See Standard One.

⁶ See Standard Two for current status and future assessment plans.

⁷ See Standard Two and associated Exhibit 21 regarding Spring 2003 pilot assessments of General Education and FYIs.

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Exhibits *(available on campus)*

- 9.A.1 & 9.A.2 General Education Discussion 1999-2001
- 9.B General Education Discussion 2001-2003
- 10.A General Education Committee Minutes and Course Approvals 1999-2003
- 10.B General Education Course Syllabi 2001-2003
- 21 Assessment Documents: General Education Pilot Assessments, Spring 2003

RECOMMENDATION SEVEN INSTITUTIONAL RESEARCH

“The committee recommends that Eastern Oregon University identify those responsible for institutional research, define and prioritize data needed for effective operations, and create the systems necessary to disseminate results. The Standard (6.C.7) does not require creation of an institutional research position.”

Standard 6.C.7—Institutional Research

Summary of 2001 Focused Interim Report

EOU shared the concerns of the Commission regarding inconsistency, incompleteness, and thus ineffective distribution of data for effective management. In response, the University gave high priority to completion of a common database that has led to a more accurate set of annual data.¹

Data Collection and Management

A number of changes have ensured more consistent and accurate collection of data:

- Training leading to accurate entry of Admissions’ data;
- Involvement of University leadership in collection and review of data;
- Reassignment of financial data to Administrative Affairs;
- Hiring a highly skilled Budget Director to oversee consistency between EOU and OUS data;
- Building systems for tracking EOCCC (Eastern Oregon Collaborative Colleges Center) students;
- Building systems for tracking teacher licensure areas;
- Building systems for tracking alumni; and
- Development of a “data warehouse.”

The University’s attention to consistent and accurate data systems led to development and implementation of basic reports and models necessary for institutional management and planning:

- “Revenue / cost” model to clarify and aggregate data for analysis;
- Enrollment projection model;
- Grade assessments reported individually to faculty members, as well as the Deans and personnel committees;
- Weekly admissions reports made consistent with OUS data;
- Budget reports tracking expended and unexpended funds;
- Annual student survey of satisfaction with advising;
- Annual survey of students participating in the Cornerstone Experience; and
- System for monitoring the persistence and retention of DDE students.

¹ See Exhibit 4, Recommendation Seven.

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Systems in place for operational purposes—i.e., getting students into classes, paying bills—now also support management information system needs through “data warehouse” strategies and development of desktop access to both the Financial Information System and the Student Information System. Data has been generally widely available on the Web, with two exceptions: 1) individual faculty grade assessments and 2) the “revenue / cost” model, which, at the recommendation of faculty, has been made available only to key budget/planning advisory committees at the school and university levels.

Institutional Research

EOU established an “Institutional Research Design Team” in Fall 1999 to identify gaps in institutional research and to study approaches to institutional research at comparable campuses. With approval and critical support from OUS, EOU and the Oregon Institute of Technology (OIT) currently share the cost of supporting an institutional research director who ensures consistency between system-level and institution-level data and reports.²

Exhibit ***(available on campus)***

4 **Recommendation Seven: Institutional Research, in 2001 Focused Interim Report**

² See Standard Six for elaboration of the institutional research and assessment position.