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Western Oregon UNIVERSITY

# WOU STRATEGIC BUDGET PROPOSAL FOR INSTITUTIONAL PRIORITIES

## I. PROPOSAL OVERVIEW

| | | |
|---|---|---|
| Title<br>WOU in Salem, including inaugural programs | | |
| Department<br>Academic Affairs | Requestor<br>Sue Monahan | |
| Requestor Email<br>smonahan@wou.edu | Requestor Phone<br>8-9216 | Request Date<br>11/20/17 |

## II. TIMEFRAME

| | | | | |
|---|---|---|---|---|
| **Proposed Dates** | Start | 7/1/18 | End | indefinite |

## III. PROPOSAL SUMMARY

*Make your summary **concise** and compelling. Avoid jargon and acronyms. A limit of 100 words is recommended.*

Working adults in our region face a dearth of nearby public university options for degree completion and post-graduate education. No public university is located in Salem, and WOU is too far away and too rooted in a traditional business day schedule to serve working adults effectively. We propose to establish an academic presence for WOU in Salem and to jumpstart two academic programs for working adults in Salem: the Masters in Organizational Leadership and the Applied Baccalaureate in Liberal Studies (for AAS degree holders).

## IV. PROPOSAL SCOPE

Describe the proposal and the expected outcomes if approved. Additional space available on the next page.

Expected outcomes for the combined proposal:

- Raise the visibility of Western Oregon University in Salem and among state government agencies
- New WOU undergraduate students annually by 2020-21 (headcount): 30
- Undergraduate degrees awarded annually by 2023-24: 24
- New WOU graduate students annually by 2020-21 (headcount): 12
- Graduate degrees awarded annually by 2021-22: 15
- Infrastructure to support additional new academic programs
- Strengthened relationship with Chemeketa Community College
- Use of excess capacity among WOU faculty to serve new students in new degrees

I. WOU in Salem Infrastructure

We request funds to support establishing and staffing a WOU in Salem presence. We are in discussions with Chemeketa Community College to lease space in its Center for Business and Industry in downtown Salem which we will use for academic programs directed at working adults who live in Salem and the surrounding area. We also propose staffing, operations and marketing support.

II. AB in Liberal Studies

About 4000 AAS degrees are awarded each year in Oregon, and almost 200,000 Oregonians have an associate's degree but have not earned a 4-year degree. If 1% of all AAS degree recipients at WOU's top community college feeder schools enroll in the AB program each year, we estimate 38 new students per year in the program. If 5% of all AAS degree holders at Chemeketa College and 1% of degree holders at the other top feeder schools enroll each year, we estimate just over 50 new students per year will enroll in the program. The estimates in our program curricular proposal are conservative, and assume that most students will attend halftime and that the program will start small and will grow to about 30 new students per year by 2020-21. By 2023-24, we estimate approximately 102 headcount students (51 FTE) will be enrolled in the program, based on modest yield (<1%) from each year's AAS degree recipients from our seven largest feeder schools.

III. Master's in Organizational Leadership

Data from the Leadership Development Factbook® (2012) suggests the industry of leadership development represents a $14 billion marketplace. Furthermore, high-impact companies in the United States spend more than $3,500 per person each year to develop mid-level leaders and over $10,000 to develop senior leaders. A market analysis exploring the viability of WOU offering an Organizational Leadership Masters degree indicated that the limited competition in WOU's market, WOU's presence as a public university, and its proximity to the state capital gives this program a strong likelihood of growing graduate enrollment for WOU. We estimate that there will be at least 24 FTE students in the program at any given time, three or more years after it is established; the program will grow towards that enrollment in its start-up stages.

## V. STRATEGIC ALIGNMENT

Describe the proposal's linkage to the university Strategic Plan.

WOU's mission is to create lasting opportunities for student success through transformative education and personalized support. WOU is distinguished by is student-centeredness, personalized approach to education, strong liberal education and the high value it places on its role as an access institution. Our strategic plan calls for the university to:

• Strengthen programs that support graduates' career, professional, and graduate school preparedness (1.1.3)
• Provide intentional and effective transfer paths to graduation (1.2.2)
• Improve access to course work for degrees, programs and certificates (1.2.3)
• Promote interdisciplinary courses and degree programs that support collaborative and multidisciplinary educational experiences and pathways (2.1.4)
• Expand activities and partnership with local and regional organizations (3.3.1)
• Strengthen and expand community college partnerships to promote education attainment (4.3.5)
• Support growth of academic programs to include new and innovative degrees and certificates (5.1.3)

The inauguration of new these new academic programs at a central Salem location contributes to each of these goals. The Salem-based programs are designed to serve working adults who seek to strengthen their position in employment markets and complete degrees and certificates. These innovative new programs will be delivered in accessible ways and embrace interdisciplinary teaching and learning. The programs will strengthen our partnerships with state government, industry and community college partners by responding to their needs for educated workers.

## VI. ADDITIONAL INFORMATION

Please include the following: implementation plan, assessment plan and the plan to sunset proposal if assessed objectives are not met in the timeframe outlined.

Implementation will begin in Summer 2018. Academic programming will commence in Fall 2018. The Master's in Organizational Leadership program will offer 3-6 3-credit courses per term in a flexible program that will include activities at the CBI in Salem. The AB in LS program will offer 11-14 credits per term in 2018-19, and add one class per term each year for the next two years, reaching 19-22 credits per term in Salem in 2020-21. We will also schedule other strategically chosen courses for the Salem campus in order to make those courses more accessible to students (e.g., with the urban location, evening or weekend hours, hybrid format) and to enhance the vibrancy of the Salem campus. Implementation of the 5 week/5 week term scheduling will drive comprehensive process changes in the Registrar's Office and Financial Aid Office that will require additional staff to manage.

The success of the WOU in Salem initiative will be assessed in several ways. We will study whether the following have been met:

• We have reached or exceeded our targets (see previous sections) for students served in the Salem-based program (Student headcount, FTE, course demand)
• Independent assessment of the Salem campus (i.e., its programs and its presence) indicate that students and the community benefit from the Salem campus as a resource and site of learning. (Market research of our students and the community)
• The academic programs are achieving their learning goals for students. (Academic Effectiveness processes)
• The Salem-based programs self-supporting, inclusive of all overhead.
• Additional new programs join these two inaugural programs on the Salem campus.

We recommend giving the Salem campus 3-5 years to establish itself as a presence, draw students, work out the bugs in its implementation, and attract additional programs. If, after 3-5 years, the programs are not succeeding at all (or at least most) of the criteria above, we can look at moving the academic programs back to the WOU campus or to an alternative site.

| **VII. BUDGET** Select all sources that will fund this proposal and complete form A (below) for each source. (Additional copies on pages 6-8.) | | | |
|---|---|---|---|
| Education & General ☑ | Grant ☐ | Self-Support Academic ☐ | Self-Support Non-Academic ☐ |

| **A. Funding Source** | Education & General ☑ | | Grant ☐ | Self-Support Academic ☐ | | Self-Support Non-Academic ☐ |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | 24 grad, 6 UG | 48 grad, 15 UG |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | | | | FY18 | FY19 |
| **FTE** | | | | | 3.97 | 4.10 |
| **Salaries** | | | | | 192,400 | 219,400 |
| **Benefits** | | | | | 146,844 | 162,681 |
| **Materials & Supplies** | | | | | 25,110 | 20,160 |
| **Travel** | | | | | 8,890 | 9,490 |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | 100,000 | 100,00 |
| **TOTAL** | 0 | 0 | 0 | 0 | 493,244 | 531730 |

Please note that the budget narrative/justification can be found in the spreadsheet that accompanies this document. This request form did not have a location for this information, but it is key to understanding the proposal.

| **A. Funding Source** | Education & General ☐ | | Grant ☐ | Self-Support Academic ☐ | | Self-Support Non-Academic ☐ |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0 | 0 | 0 | 0 | 0 | 0 |

| **A. Funding Source** | Education & General ☐ | | Grant ☐ | Self-Support Academic ☐ | | Self-Support Non-Academic ☐ |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0 | 0 | 0 | 0 | 0 | 0 |

| **A. Funding Source** | Education & General ☐ | | Grant ☐ | Self-Support Academic ☐ | | Self-Support Non-Academic ☐ |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0 | 0 | 0 | 0 | 0 | 0 |

| VIII. PROPOSAL SIGNATURES | | |
|---|---|---|
| Department Head | Name | Signature |
| Division Head | Name | Signature |
| Vice President | Name Stephen Scheck | Signature |

| IX. ACTION | | |
|---|---|---|
| **Recommended by UBC** | Yes ☐ No ☐ | Date |
| Comments: | | |
| **Recommended by President** | Yes ☐ No ☐ | Date |
| Comments: | | |
| **Final Approval** | Yes ☐ No ☐ | Date |
| Comments: | | |

| Category | More detail | 2018-19 | 2019-20 | Budget notes/Justification |
|---|---|---|---|---|
| **Infrastructure for Salem Presence** | | | | |
| **Facilities** | Lancaster Campus | 0 | 0 | At this time, CCC has offered to let WOU teach non-competing courses at the Lancaster campus in the evening and on weekends with no facilities charges. Lower-division general education courses will be WOU's focus on at the Lancaster campus. |
| | CBI-Downtown Salem | 20000 | 20000 | This is an estimate based on $5,000 per term. David McDonald is meeting with Jim Eustrom to get a firm cost nailed down. |
| **Personnel** | Salary | 105000 | 105000 | 1.0 FTE Site Coordinator (45k base)-- PD in development. Provides WOU presence during WOU operating hours at CBI; point of referral and first contact for Financial Aid, Registrar, Veterans, Technical Trouble Shooting; outreach and marketing for Salem-based programs; coordinate scheduling for programs in Salem, including lower division course offerings; manage operations budget. assessment and adjustment of program delivery. 1.0 additional support in financial aid office to support 5/5 structure (40k base). Additional 0.5 in Registrar's Office to support 5/5 structure (40K base). |
| | OPE | 80550 | 80550 | OPE calculated at 31% benefits plus $16000 fixed benefits. |
| **S&S** | Supplies, Equipment | 15000 | 7500 | Start-up equipment costs in 2018-19 include WOU furniture, storage solutions, equipment to support marketing of WOU; thereafter, equipment and supplies to support the WOU presence in Salem including travel for Site Coordinator to engage in marketing and outreach. Travel cost estimates: 250 miles per month * 12 months per year * 0.53 per mile = $1590 per year for mileage; 20 nights per year of overnight travel so $120 per night * 20 = $2400; $60 per diem for ~30 days of travel = $1800) |
| **Marketing** | WOU in Salem and inaugural programs | 100000 | 100000 | Funds to develop the WOU in Salem brand (including a better name, if needed) and associated marketing materials; identify strategic marketing opportunities and purchase services (e.g., advertising, sponsorships, social media and search engine presence); we expect that external consultants will be called upon to support the initial stages of this work. Funds will be strategically distributed among the overall WOU in Salem Identity, the AB in LS and IDS degree completion programs, and the Org Leadership MA program. |
| | | | | Program total: 2018-19 - $320,550, 2019-20 - $315,050 |
| **Salem-based program: AB in Liberal Studies** | | | | |
| **Personnel: Instruction** | Salary | 21000 | 27000 | We estimate that 50% of AB in LS courses offered in Salem will require course buyouts for the home department to replace the teaching. The other 50% can be taught in load with existing WOU faculty. Buyout rate is $1000 per credit. In 2018-19 we anticipate 21 total credits will require buyout. 21*$1000=21k in salary. In 2019-20 we anticipate adding 6 credits to the 2018-19 base for buyouts, so 27 total credits will require buyouts. |
| | OPE | 13977 | 15837 | We calculate benefits to include proportion of the $16k fixed costs, as well as 31% OPE rate. |
| **Personnel: Program support** | Salary | 10000 | 10000 | 0.25 FTE Academic Advising Support. It is possible that the site coordintator can provide this service in the first year or two of the program, but ultimately this should probably be consolidated with program support for Interdisciplinary Studies, as both are flexible degree completion programs. $40k annual salary estimated. |
| | OPE | 7100 | 7100 | We calculate benefits to include proportion of the $16k fixed costs, as well as 31% OPE rate. |
| **S&S** | Supplies, Equipment | 14000 | 17150 | $2000 for Professional memberships, supplies, equipment, travel for program director and academic support staff. Also includes $1800 in 2018-19 and $2400 in 2019-20 for faculty mileage reimbursement (once per week, 11 weeks per year, 12 and then 15 courses per year, 34 roundtrip miles, 0.53 per mile); stipends for faculty for course development and PLC |
| | | | | Program total: 2018-19 - $66067.67; 2019-20 - $77086.67 |
| **Salem-based program: MA in Organizational Leadership** | | | | |
| **Personnel: Instruction** | Salary | 33000 | 54000 | 2018-19: 9 fall, 9 winter and 15 spring credits, 0.733 FTE spread across multiple faculty. 2019-20: 18 credits per term, FWS, 1.25 FTE spread across multiple faculty. |
| | OPE | 21963 | 35940 | We calculate benefits to include proportion of the $16k fixed costs, as well as 31% OPE rate. |
| **Personnel: Course support** | Salary | 23400 | 23400 | 1.0 FTE Course Assistant for a 9 month appointment to provide 2 hours of support per course per week to instructors and students during the term, and support in setting up, maintaining and updating and taking down courses. $15/hour |
| | OPE | 23254 | 23254 | We calculate benefits to include proportion of the $16k fixed costs, as well as 31% OPE rate. |
| **Supplies, Equipment** | | 5000 | 5000 | Includes $1300 for instructor mileage, $2500 for supplies and equipment for simulations and other high impact practice support; $1200 for office supplies, professional memberships, conference travel. |
| | | | | Program total: 2018-19 - $136,594; 2019-20 - $136594 |
| **WOU in Salem and Inaugural Programs, Total** | | **493244** | **531731** | |

**WOU in Salem and Inaugural Programs, by expense categories**

| | | | |
|---|---|---|---|
| Personnel: FTE | 3.45 FTE | 4.10 FTE | 1.0 Site coordinator, 0.467 ABLS Faculty, 0.25 ABLS Academic Support, 0.733 (2018-19) and 1.25 (2019-20) Org Lead instruction, 1.0 Course assistant (in 2018-19); in 2019-20, add 0.13 FTE to ABLS instruction. |
| Personnel: Salaries | 192400 | 219400 | |
| Personnel: OPE | 146844 | 162681 | |
| S&S (not travel) | 25110 | 20160 | |
| Travel | 8890 | 9490 | |
| Marketing | 100000 | 100000 | |
| Facilities | 20000 | 20000 | |
| | 493244 | 531731 | |