



Western Oregon University Federation of Teachers
Local 2278, AFT, AFL-CIO
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The Western Oregon University Federation of Teachers (WOUFT; AFT Local 2278) Response to the Article 15 Draft Plan - Submitted 23 November 2020

Below, please find the WOUFT Executive Council's response to the Article 15 draft plan (dated 12 November 2020). Your careful consideration is appreciated and we remain available to answer any questions.

Introduction/Overview

The Article 15 draft plan, released late on Thursday, November 12th is very troubling. The opening section describes WOU's mission and values, but elements of the plan appear to undermine the very values and "qualities of mind" that WOU espouses as commitments. We believe that any approach to realigning WOU's finances with our institutional mission must keep the interests of students at its center. The draft plan explains WOU's financial position as the result of the pandemic as well as a pattern of declining enrollment that has worsened since 2015, necessitating the downsizing of faculty and staff. Yet just over a year ago, when Trustee approval was sought and granted for a \$1 million dollar endowment and nearly \$3 million for a building purchase in Salem, WOU's financial picture was presented in a much more positive light.

We are not persuaded that the financial situation at WOU requires many of the drastic and permanently damaging curricular actions that are identified in the plan. We are concerned that the issue of declining enrollment needs the urgent and immediate attention of the university and Board of Trustees. Though 2010 was the high-water mark for WOU enrollment and one might have expected some regression to the mean, the enrollment decline has been allowed to proceed unabated for too many years, and WOU still lacks an effective plan to grow enrollment. We are, however, convinced that the faculty we represent are capable of innovating and are enthusiastic about creating new ways of meeting WOU's financial challenges.

We hope that the administration will be responsive to faculty initiatives and ideas for growing enrollment and strengthening student retention while also carefully considering what WOUFT proposes here. As we see it, the biggest obstacle facing WOU at this moment is the steep decline in trust and morale among students, faculty, and staff, and overwhelming lack of confidence in the leadership appointed to move us forward. Acceptance and implementation of the recommendations offered by WOUFT in this response would be a significant first step in restoring the morale and earning back the trust of WOU faculty.

The sections below include:

- I. a description of Article 15 process shortcomings and unrealistic timelines
- II. a list of recommended interim measures that address our financial challenges, and
- III. plans for savings incentives and opportunities.

I. Process Shortcomings and Unrealistic Timelines

The WOUFT Executive Council recognizes that WOU faces significant financial challenges. However, we strongly object to the proposed elimination of majors and upper division course offerings that unnecessarily limit student learning and career pathways. The proposed plan appears to indicate a broader change in WOU that has not been sufficiently discussed with campus stakeholders.

The Article 15 draft plan has employed an opaque process not defined in the draft document nor evident through the external data sources provided, with only perfunctory opportunities for stakeholder involvement.

The WOUFT Executive Council highlights three primary concerns about the Article 15 process:

1. An undisclosed and unvetted apparent change in the “future direction” of WOU
2. Inadequate opportunities and unrealistic timelines for stakeholder input
3. Failure to provide clearly-defined metrics and reliable and for data analysis

Prior to discussing each of these concerns in some detail, we note that President Fuller, in a letter sent to the faculty by email on July 1, 2020, cited Dickeson’s *Prioritizing*

Academic Programs and Services: Reallocating Resources to Achieve Strategic Balance (2010) as a primary resource to guide program prioritization at WOU. We find Dickeson’s study of program prioritization to be a good model, yet it was not applied at WOU.

For reference, Dickeson’s recommended review process (pp. 67-70) is below:

Dickeson’s Recommendations	WOU’s Process
Announce criteria in advance	Not implemented by the Article 15 Taskforce
Decide what relative weights should be given to the criteria	Not transparently implemented by the Article 15 Taskforce
Involve program faculty and staff in designing additional data formats to fit the criteria	Not implemented by the Article 15 Taskforce
Provide data to support the criteria	Not consistently implemented by the Article 15 Taskforce; so far, reports from multiple faculty who have worked with the data, including those on the Faculty Senate Sustainability Taskforce indicate that data sets are incomplete, have significant anomalies, and wrongly categorized data
Note that data do not substitute for sound judgments; have a methodology	Not implemented by the Article 15 Taskforce

Communication

Data from the Campus Climate Survey presented in Spring 2020 provided early indications that there were pervasive concerns about communication, transparency, and information sharing on campus. In contrast, Dickeson (p. 35) notes “Reform of this type requires extraordinary communication.” Dickeson states:

“The campus should clarify both the design of the program prioritization process and who will manage it. Questions will abound, and rumors will circulate. Participants need to know where to get straight answers, and they will need to feel that answers are consistently given. The institution **should publish a timetable for the process, which balances the urgency of the task with the reasonableness of the time constraints of its participants”** (p. 91, emphasis added).

WOU’s timetable included deadlines that prevented stakeholders from having time for proper analysis and consideration. WOUFT’s Executive Council finds that the university’s communication during the Article 15 process fell far short of “extraordinary,” causing precisely the issues about which Dickeson warns.

Unilateral Change in the “Future Direction” of WOU

Dickeson writes, “The unifying force for stakeholders—the flag around which all should rally—is the mission of the institution” (p. 36). We note the draft report’s top-line reference to “strategic priorities and future directions.” The draft plan provides compelling evidence that WOU’s “future direction” is being shaped without input from the incoming president or other critical stakeholder groups.

There has been no inclusive campus discussion, during or immediately prior to the initiation of the Article 15 process, of any changes to WOU’s strategic priorities or mission. The current Article 15 process exhibits the hallmarks of a unilateral decision to remake WOU and university program offerings without significant input from all campus stakeholders, in opposition to WOU’s stated value of shared governance and in violation of the Faculty Senate’s important role in managing the curriculum. Further, we are concerned that WOU students will receive something less than “a personalized experience in a comprehensive, mid-sized public university” as stated on p. 3 of the WOU Strategic Plan.

The proposed cuts would leave WOU with a program structure which would no longer be accurately described as “comprehensive.” Moreover, the suggested cuts are

diametrically opposed to what we proudly have been telling students for many years, that

"WOU is a public liberal arts university, a place that infuses the benefits of liberal education into the learning of every student. Whatever area of specialty you choose, building your education on a strong liberal arts foundation will help you develop a range of attributes that employers seek and communities need."
(from <https://wou.edu/las/value-of-a-liberal-arts-education/>)

Stakeholder reports in response to Article 15 reiterate this message. The three reports from the College Deans (COE, LAS, and Library), Faculty Senate Executive Committee (FSEC), and the Sustainability Taskforce all emphasize the need to maintain the present mission of WOU, and as such do not suggest that a change of mission is necessary nor desirable. Though the Deans' reports were not made available to the campus community at large, the Faculty Senate Executive Committee was given the opportunity to view them and respond.

The FSEC response to the Deans' reports notes that they "were heartened to see how many programs are profitable and necessary on our campus. We were glad to see that the budget demands can be met through efficiencies rather than program cuts, and **wish to emphasize that none of the three Deans' reports recommends making dramatic elimination of programs.** Indeed, the reports clearly articulate that eliminating programs will only worsen the university's financial standing and ability to meet the needs of WOU students" (p. 1, emphasis added).

Subsequently, the FSEC report, which called for more faculty input, was met by the administration's agreement to form a narrowly focused Faculty Senate Sustainability Taskforce. This group, which included representatives from all divisions on campus, met in the Fall and reiterated the need to follow the recommendations of the Deans' reports, emphasizing a commitment to the **current** mission of Western Oregon University. The WOU Faculty Senate Sustainability Taskforce report maintains, "We are a liberal arts university that values a diverse set of offerings for our General Education program, and we assert that having a robust choice of majors is important to our student body" (p. 4).

The WOUFT Executive Council emphatically reiterates these same recommendations. We are a liberal arts university with many course offerings that enhance and support various programs. We have a history of strong interdisciplinary values. A cut to one program can result in harm to many programs, damaging the overall mission of Western Oregon University and the educational experience of the students we serve.

Inadequate Opportunities and Unrealistic Timelines for Stakeholder Input

Upon being informed of the invocation of Article 15 in May, faculty demanded that the Faculty Senate be included in the process during a special meeting held in June. As a result, the Faculty Senate Executive Committee was given the opportunity to respond to the Deans' reports. In August and September, faculty panels convened in order to discuss the FSEC response to the Deans' reports (notably, faculty on these panels were not given access to the Deans' reports, only the FSEC response to the Deans' reports). The Faculty Senate Executive Committee pushed for the formation of the Faculty Senate Sustainability Taskforce. This request was eventually granted in September. Then, in October, the Faculty Senate Sustainability Taskforce had three weeks to meet and respond, which was insufficient to enable them to do their work properly. This lack of adequate time is highlighted in their report.

According to Dickeson, the national standard for the process of making such deep and broad cuts is 1-3 years, often aligned with accreditation and always with substantial faculty and other stakeholder input. WOU's Article 15 process has been entirely inconsistent with this national standard. Dickeson cautions,

“I believe that academic program prioritization must be seen as an extraordinary process requiring a suspension of ordinary behaviors. The institution's future is at stake. If meaningful faculty involvement is desired, then accommodation of the time to participate fully should be made.” (p. 108).

Additionally, as underscored above, the administration apparently did not plan for faculty input, which was only granted after repeated requests from faculty, including the body charged with oversight of WOU curriculum - the Faculty Senate.

Further, these processes should be transparent and inclusive. Dickeson states,

“The price of open communication is that some information can be embarrassing or misleading. If, for example, a program is recommended for discontinuance at one level, word spreads to the program constituents, including students enrolled in the program, who react as though the decision were final. I have seen students withdraw from the institution, operating on the misassumption that the program was to be cut. The alternative— to conduct the prioritization process in secret—is unacceptable. Meeting behind closed doors breeds suspicion. Resolution of this dilemma will require patience and understanding from all campus stakeholders.” (p. 110-111)

WOU's failure to apply these principles led to precisely the kinds of undesirable effects predicted by Dickeson. A detailed outline of the timeline under which such significant decisions were expected to be made is provided below:

- *May 7:* President Fuller notifies the campus of “imminent” program curtailment and invokes Article 15
- *May 21:* WOUFT representatives meet with President Fuller to discuss Article 15, to ask questions and to get more information. President Fuller suggests the magnitude of cuts is \$4,000,000 for Academic Affairs
- *May 29:* Results of the Campus Climate Survey are presented
- *June 1:* WOUFT meets with President a Fuller a second time and presents alternative ideas for budget efficiencies and salary savings, including a retirement incentive we believed would attract volunteers
- *June 18:* Rubric for program prioritization designed by administration is shared with the Faculty Senate President; the Faculty Senate Executive Council pushes for this to be shared with all Faculty
- *July 1:* Rubric for program prioritization is shared with the entire faculty
- *July 15:* Deans submit reports for program efficiencies and cuts, all three emphasize that they did not use the rubric that was created by the administration
- *July 20:* while most faculty members are off contract, FSEC is notified by President Fuller that FSEC can be a part of the process, more than twelve weeks after he declared that “program or discipline curtailment” is imminent
- *July 23:* FSEC receives the Deans’ reports

- *August 3:* WOUFT becomes aware of the Retrenchment Plan Taskforce; it is noteworthy that President Fuller did not cite retrenchment in his invocation of Article 15 to WOUFT but referred to program elimination as “a version of retrenchment.”
- *August 7:* President Fuller shares the retrenchment taskforce side letter that includes a suggested timeline for retrenchment
- *Late August to early September:* Faculty senate panel discussions are convened to discuss the FSEC response to the Deans’ reports
- *September 18:* Campus call is put out for service on the Faculty Senate Sustainability Taskforce (FST), noting that the FST’s report would be due in less than six weeks’ time; the FST is able to constitute quickly and convened in early October, but is left with less than four weeks to complete its task
- *October 8:* President Fuller announces his retirement
- *October 27:* Faculty Senate Sustainability Taskforce presents their report to the Faculty Senate
- *November 12:* President Fuller sends his draft Article 15 Program Curtailment Plan to WOUFT and FSEC, indicating that he requires these bodies to provide final feedback by November 23rd, giving campus stakeholders only 6 working days to analyze and respond
- *November 15:* Provost Winningham releases the plan to students in an email announcement
- *November 16:* President Fuller sends the Draft Plan to the entire campus
- *November 18:* Board of Trustees meets to discuss Article 15 plan
- *November 20:* WOUFT receives data requested to help inform our response
- *November 23:* Reports from WOUFT and FSEC are due to President Fuller
- Tellingly, President Fuller notes that he intends to implement the Final Plan “on or around November 30” which means that he will need only one week to assess and consider the recommendations of the Senate and Union before initiating faculty layoffs and eliminating academic programs.

As outlined, this seven-month process indicates a stakeholder input timeline which itself renders any meaningful program curtailment review virtually impossible. It is also antithetical to recommendations made by Dickeson. The shortcomings of the process

have been exacerbated by the ongoing global pandemic, with few people on campus and communication largely limited to email and virtual meetings.

The Faculty Senate Sustainability Taskforce (FST) came to a similar conclusion about the rushed proceedings. The FST report states

“... it would be inappropriate for faculty to make such decisions under such a short timeframe and without a much more thorough process of familiarization with departments and programs across campus. The University, like other large organizations, is a complex and dynamic system of interrelated programs, offices, and units, and it is impossible to predict all possible implications of any proposed cuts without thorough consideration of the existing relationships between these units. Given the above, it is unreasonable to expect a well-informed recommendation regarding specific budget cuts within 3.5 weeks....It is our assessment that providing thoughtful, specific, and carefully-considered strategies aimed at meeting certain budget reduction amounts (e.g., \$1M, \$2M, etc.) is impossible within the timeline provided to this taskforce...” (p. 3).

Failure to Provide Reliable Data and Clearly Defined Metrics for Data Analysis

Program prioritization committees should be representative of the campus, and include administration, faculty, staff, and students. Data and metrics to be used should be thoroughly vetted and agreed upon **prior** to being used. Dickeson states,

“Several campuses with which I have worked on this process have taken shortcuts ... Campuses that undertook the full analysis instead came away from the process convinced they had made stronger decisions more consonant with their ongoing strategies. **But whatever criteria are chosen should be clearly identified in advance and communicated consistently throughout the process.**” (p. 68, emphasis added)

As is evident from our timeline, the administration’s rubric for program prioritization was not shared with the entire campus until July 1st. This controversial rubric was never discussed with the campus or revised based on departmental feedback regarding data errors. Inaccurate calculations of FTE were used to develop conclusions about program costs and revenue generation.

The administration also cited the use of *The Hanover Report* (2018) to inform their cuts. It is important to note that Dickeson cautions against the overuse of national data:

“For several reasons, care must be taken in relying too heavily on national demand data. Many students change their minds about choice of academic major after a term or two of college. They are exposed to academic programs and choices in college they simply did not know existed when they were in high school completing the surveys on which the national data are based. Too, there is a faddishness about academic major choice that is disquieting. The longer one looks at trend lines, the more peaks and valleys in demand curves one can observe” (p. 72).

Though the results of *The Hanover Report* were provided to WOU administration in August 2018, and later shared on the Institutional Research (IR) Dashboard, they were not widely shared in campus discussions. Rather, the results were simply made available without interpretation or context. It is frustrating to us that the report was used to inform proposed cuts, but gave no call to action to begin the work of studying the report results when the work needed to be done to strengthen programs and shape professional paths for students. It was not until Spring 2020 that plans for imminent program curtailments were announced.

Consequently, without prior discussions about program priorities before the invocation of Article 15 in May, there was no possibility of developing a shared understanding of criteria for program prioritization, nor was there any discussion with stakeholders as to what was working at WOU and could be enhanced. Once the Faculty Senate Taskforce was given the opportunity to respond, they recommended that WOU

“Augment existing and/or establish assessment-, program-, and curriculum-relevant protocols with formalized, clear, and consistent processes for potential program development, review, and reduction that includes adequate timelines to properly evaluate academic program outcomes in the context of any proposed developments, alterations, reductions, or elimination” (p. 4).

The WOUFT Executive Council concurred with the FST's conclusions and lamented the lack of clear metrics for making informed judgements.

Because there was no prior discussion of program priorities, there was no shared understanding of metrics for program evaluation, and because the process was opaque and disjointed, there are a number of presumably unintended consequences to the interconnected course offerings in programs at Western Oregon University. One example is the drastic cuts to several programs, including Philosophy, Anthropology, Geography and Earth Science. These are integral parts of the General Education requirements for Foundations: Critical Thinking and Integrating Knowledge: Science, Technology and Society. Eliminating faculty in these areas will have a disproportional and negative impact.

Furthermore, the faculty were assured by the President and Provost in the *WOUWay v.5* Handout, announced at the beginning of the General Education Reform process, that "No tenured or tenure track faculty will lose their jobs as a result of Gen Ed. Reform" (p. 3). The General Education revisions recommended by the General Education Taskforce were based on this assurance. The proposed Article 15 program and faculty cuts are clearly in opposition to this promise.

Dickeson offers the following important advice:

"Several campuses with which I have worked on this process have taken shortcuts. Due to the press of financial or other exigencies, and occasionally because insufficient data were available, they have evaluated programs using as few as three of the criteria (typically demand, cost, and quality). And although that approach no doubt met their immediate needs, a comprehensive review might have yielded richer information and presumably better-justified decisions. Campuses that undertook the full analysis instead came away from the process convinced they had made stronger decisions more consonant with their ongoing strategies. **But whatever criteria are chosen should be clearly identified in advance and communicated consistently throughout the process.**" (pg. 68, emphasis added)

“Judgments about programs **should be made in ascending order of institutional responsibility**. That is, rankings of programs, based on the data, should be made first by department or division heads and then on three ascending levels: first by directors or deans, then by vice presidents, and finally by the president whose recommendations go to the board of trustees for final approval. The levels and titles vary, of course, by campus. In institutions, directors typically rank programs and then send recommendations to the provost and president, who act as a unified level of review prior to board action.” (p. 100, emphasis added).

A careful analysis of the timeline alongside other shared concerns demonstrates that both of these major suggestions were ignored. Namely, shortcuts were taken and final suggested cuts came from the top, disregarding many of the suggestions from division chairs, Deans, the Faculty Senate Executive Committee and the Faculty Senate Sustainability Taskforce. These two concerns are illustrated clearly in the administration's approval of two replacement hires during the 2019-2020 academic year in two programs (Chemistry and Earth and Physical Sciences) that are now targeted for curtailment in their draft plan. These cuts seem especially ill-advised given that these national searches for faculty involved considerable financial expenditures and significant time investments.

These administrative decisions to first approve these important and necessary investments, and then eliminate positions in the very same programs, amplify our concerns about the credibility of the claim that program curtailments are necessary and illustrate the unnecessary havoc created by the rush to implement Article 15 cuts. This is especially puzzling given the clear directions for how to enact a “humane” program curtailment process as outlined by Dickeson, warning against shortcuts and top-down decisions.

The suggested cuts in the “Report of the President’s Taskforce on Article 15,” shared on November 12, 2020, do not follow the best practices that are suggested in program curtailment and do not follow a clear set of metrics shared with all stakeholders in advance of the process. These omissions in process have caused us to question

whether the President's Taskforce holds an as yet unshared and undebated vision of the "future direction" of WOU.

II. Interim Measures

In recognition of WOU's current financial challenges, the WOUFT Executive Council endorses implementation of the Faculty Senate Sustainability Taskforce recommendations, which largely embrace the recommendations in the Deans' report. Unlike the Article 15 draft plan, these recommendations do not eliminate or curtail programs, nor do they remove tenure-track / tenured faculty. The Sustainability Taskforce's recommended measures would immediately help to remedy WOU's financial situation.

Another significant concern we have with the implementation of the current program prioritization plan is the administration's insistence on a timeline that appears to intentionally limit faculty input, undermining shared governance. We strongly recommend extending the timeline to give faculty governance groups such as the Faculty Senate Sustainability Taskforce a minimum of one calendar year to follow and implement the strategies articulated in Dickeson (2010), as detailed above, and to pursue collaborative efforts to address WOU's enrollment problems. In doing so, the amended timeline should include check-in points that coincide with anticipated federal and state funding and Public University Support Fund (PUSF) allocation announcements.¹ This information about actual dollars reaching our campus would then be reflected in WOU revenue data releases, rather than inexact WOU budget projections.

As part of the Sustainability Taskforce's consideration of program prioritization following a revised timeline, and under the auspices of shared governance, WOU would provide

¹ The President's plan continues to operate under the assumption of a 17% decrease in the Public University Support Fund over the biennium. The Public University Support Fund (PUSF) for 2019-21, which provides funding to all seven universities, was passed by both the House and Senate at \$837 million, an increase of \$100 million over the budget approved in the 2017 Session. The most recent state Economic Forecast indicates better than expected tax revenue, highlights the unprecedented size of state reserves, and predicts economic recovery as early as 2023.

information about metrics used in the November 12th Article 15 draft plan, including, but not limited to:

- 1) overall dollar amount that needs to be saved;
- 2) additional data deemed necessary to inform decision-making in a timely way;
- 3) rater - reliability, and other relevant training.

In conjunction with adjusting the timeline, we recommend limiting the workload of certain committees, as Dickeson recommends, for part of the 2020-2021 and all of the 2021-2022 academic years, in order to create the conditions necessary for a unified focus on sustainability. Dickeson asks,

“If meaningful faculty involvement is desired, then accommodation of the time to participate fully should be made. Could the plethora of campus committees and the inordinate number of committee meetings be suspended for a period of time, and that time better devoted to prioritization? Could some part of the prioritization take place primarily in the fall (springtime on campus is not a season usually conducive to judicious decisions) or between terms? Could release time be reallocated from current purposes to this purpose?” (p. 108).

Research into prioritization processes on other campuses reflects a complex, broad, and participatory approach that has not been followed at WOU.

The WOUFT Executive Council is also concerned about sharing sacrifices made under the auspices of program prioritization. According to Dickeson (p. 105),

“Administrative officers, by contrast, will use the argument that they “already gave” when donations were sought for the cause. This argument is usually not convincing, however true it might be. The specter of a process to right the listing institutional ship, with only half the people on board doing their share to help, is not politically acceptable at most campuses. If we are truly a community, the argument goes, then we need to undergo this analysis as a community.”

Thus far, the draft plan includes mostly token salary reductions for senior administrators (i.e., four (4) furlough days) and the reduction of the president's salary to the 2017-18 level for FY2020-21. In short, we do not see the sort of proportional sacrifices being offered by the administration that have already been exacted on classified staff and that are proposed for faculty in the draft plan.

To rectify this, we recommend evaluating upper administrative positions for balance and the type of expertise needed for WOU to thrive. For example, the recent move by administration to increase the number of legal counsel positions from 1 to 3 should be reconsidered. Additional upper administration positions, especially those created in recent years, should be considered for elimination as part of proportionally "right-sizing" the administration. Rather, WOU should employ a recruitment and retention specialist and/or marketing expert with successful track records in higher education institutions that serve similar student populations, to generate a sorely-needed increase in enrollment. All of these measures are of critical importance during a time of declining enrollment.

In addition to preserving undergraduate programs currently offered at WOU, along with the faculty dedicated to supporting them, we should continue exploring new program offerings that have real potential to increase enrollment and that will attract the diverse students we strive to serve. These new programs must clearly align with WOU's Mission, Vision, Values, and Purpose.

An example would be to develop "Professional Interpreting and Translation" graduate programs in ASL and Spanish. Another would be to partner with public agencies, not-for-profits, and media producers to develop high impact application and internship experiences that generate additional tuition revenue with minimal instructional/oversight costs to the university.

Another alternative to program curtailment -- one which has been successfully implemented at WOU in the past -- could entail deployment of some faculty in recruitment, marketing and outreach efforts. This is a better approach than eliminating programs altogether, particularly when those programs are necessary to building the "long-term qualities of mind" which the administration alludes to in the introduction to the

Article 15 draft plan. This would also be in line with Dickeson's recommendations to use faculty for alternative purposes rather than eliminating them.

III. Savings Incentives and Opportunities

Retirements

Retirements among faculty at the top of the salary schedule would certainly ease the fiscal shortfall at WOU.² Earlier in the year, WOUFT surveyed faculty as to whether they might consider retiring if given sufficient incentives. Roughly 20 faculty members indicated such an interest. WOUFT presented a proposal in bargaining as well as in our initial response to the invocation of Article 15. We do not believe that the draft retirement agreement proposed by the university will be effective. Faculty reported that the incentives offered previously were insufficient to allow them to consider this option.

Furthermore, faculty feel strongly that it would be a disincentive to retirement if WOU were to prohibit them from returning to WOU as a non-tenure track faculty member. If retired faculty members were to return to teach where needed for a limited number of classes at non-tenure-track pay steps, the cost savings would be considerable. Such faculty members would also be available as a resource to WOU, able to step in to teach in emergency situations, such as an instructor suddenly needing to take FMLA leave.

A frequently mentioned disincentive to retirement among faculty below the age of 65 is the need for health insurance coverage through the Medicare eligibility age. WOU has claimed they could not offer health coverage to retirees. However, WOUFT inquired with the chief administrator of PEBB and was informed that it is indeed possible for WOU to extend health coverage to retired faculty - it may be rarely done in higher education, but it is regularly done in K-12. If WOU were to continue to offer PEBB coverage for faculty

² For example, for each faculty member who retires near the upper end of the salary schedule, say \$95,000, who is replaced by a new faculty at the lower end, say \$55,000, there is a savings of approximately \$40,000 in the first year of the new faculty members' employment, alone. Twenty such retirements would yield more than \$800,000 in savings even with all positions replaced, excluding the costs of the retirement incentives and position recruitments (faculty on lower steps have lower retirement contributions.)

between ages 62 and 65, there would be a significant number of WOU faculty who would feel more secure about retiring.

Proposal - Faculty Retirement Incentive Program

As a faculty retirement incentive, we recommend that all faculty retiring by the end of summer session 2021 be given a 6% salary incentive plus support for health insurance. Those faculty aged 64 receive full health insurance funding until they turn 65 and are eligible for Medicare. Those aged 63 - 64 get 85% of funding until Medicare eligible. Those aged 60-62 at retirement get 75% health insurance funding for three years.

WOUFT Executive Council would welcome the opportunity to engage with administration in discussions of retirement incentives.

Voluntary Reduced Load

Some faculty members have indicated that they would be willing to volunteer for time-limited unpaid teaching load reductions to help with the university's financial shortfall. However, it is important to note that some faculty have indicated that they would agree to this type of arrangement only if they could preserve faculty positions in their own program(s) or academic units, while others have not made this stipulation; flexibility should be afforded faculty who are willing to make this sacrifice. Typically, faculty who are at higher salary steps are more financially secure, and therefore might be able to afford such voluntary reductions.³ Faculty included such offers in their 10% & 17% reduction plans in Spring term, when they thought doing so might save NTT colleagues in their areas from FTE reductions or layoff.

Faculty might also agree to a workload reduction and teach their normal instructional load if the reduction were to relieve them of all service and scholarly duties while the reduction was in effect. In addition, some faculty might even volunteer to take an entire term off without pay (i.e., a form of unpaid sabbatical so as to not impact years of service), if their circumstances allow it and the university committed to covering all benefits at the same rate (as when employed at 1.0 FTE) during that period.

³ For instance, a faculty member at step 34 making \$88,959, taking one unpaid four-credit course reduction in a year, would represent a savings of about \$5931 in salary.

Because the financial burden for faculty at lower salary steps is correspondingly more onerous, we feel strongly that these options must be voluntary and also confidential to ensure that those at lower steps who cannot afford to lose the income are not pressured or penalized in any way for not doing so.

Conclusion / Summary:

The WOUFT Executive Council is cognizant of the significant financial challenges currently facing WOU, and offers the following conclusions and recommendations.

I. Process Shortcomings and Unrealistic Timeline

- Invoking Article 15 was not necessary.
- The administration's handling of WOU's financial challenges has weakened already strained relationships with students, staff, and faculty.
- Program prioritization has not followed processes and procedures recommended in a source (Dickeson, 2010) cited by the administration.
- Problems with incomplete or inaccurate data increased the likelihood that proposed cuts will lead to harmful and unintended consequences.

II. Interim Measures

- Recognizing that savings are necessary, WOU should implement the recommendations of the Faculty Senate Sustainability Taskforce (FST).
- The FST (or Senate, at large), along with other stakeholders, should be given a minimum of 12 months to examine the need for program prioritization.
 - The process should follow recommendations in Dickeson (2010).
 - The timeline should be adjusted to accommodate external funding decisions that impact WOU's actual revenue rather than imprecise budget projections.
- Administrative cuts (that represent authentic shared sacrifice and / or reorganization to address areas such as student recruitment where investment is needed) should be enacted.
- Deploy some faculty in recruitment, marketing and outreach efforts.

III. Savings Incentives and Opportunities

- Offer meaningful retirement incentives with the potential to create significant cost savings.
- Allow voluntary, temporary, unpaid load reductions to yield additional savings without negatively impacting students and their degree programs.

Respectfully Submitted,

***The Western Oregon University Federation of Teachers (WOUFT; AFT Local 2278)
Executive Council***

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