

4-3-2017

Faculty Senate Monthly Packet April 2017

Portland State University Faculty Senate

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Faculty Senate, 3 April 2017



In accordance with the Constitution of the PSU Faculty, **Senate Agendas** are calendared for delivery eight to ten working days before Senate meetings, so that all faculty will have adequate time to review and research all action items. In the case of lengthy documents, only a summary will be included with the agenda. Full proposals of curricular proposals are available at the PSU Curricular Tracking System: <http://psucurriculumtracker.pbworks.com>. If there are questions or concerns about agenda items, please consult the appropriate parties and make every attempt to resolve them before the meeting, so as not to delay the business of the Senate. Items may be pulled from the curricular consent agenda for discussion in Senate up through the end of roll call.

Senators are reminded that the Constitution specifies that the Secretary be provided with the name of his/her Senate alternate. An alternate is another faculty member from the same Senate division as the faculty senator. A faculty member may serve as alternate for more than one senator, but an alternate may represent only one senator at any given meeting. A senator who misses more than three meetings consecutively will be dropped from the Senate roster.

www.pdx.edu/faculty-senate

PORTLAND STATE
UNIVERSITY
FACULTY SENATE



To: Senators and Ex-officio Members of the Senate
From: Richard H. Beyler, Secretary to the Faculty

The Faculty Senate will meet on **3 April 2017** at 3:00 p.m. in **Cramer Hall 53**.

AGENDA

Items and reports on the *consent agenda* will be approved or accepted as submitted in the packet unless objections or requests for separate discussion are registered before the end of Roll Call.

PLEASE NOTE:

- **It is proposed, as part of the *consent agenda*, to move item G.4, Annual Report of AAC, to between items C.3 and C.4.**
- **Item E.3, Resolution on class size, refers to Item G.3.b.**

- A. Roll Call
- B. * Approval of the Minutes of the 6 March 2017 Meeting – *consent agenda*
- C. Announcements and Discussion
 - * 1. OAA response to March notice of Senate actions – *consent agenda*
 - 2. Announcements by Presiding Officer
 - 3. Announcements by Secretary
 - * *Item G.4 moved here:* Annual Report of the Academic Advising Council
 - 4. Discussion. Role(s) of faculty in advising
- D. Unfinished Business
 - * 1. WR 228 to qualify as a University writing requirement course
(ARC, *postponed from March meeting*)
 - * 2. Constitutional amendment: membership of AQC (Steering)
 - * 3. Constitutional amendment: part-time ex-officio member of Faculty Senate (Steering)
- E. New Business
 - * 1. Curricular proposals – *consent agenda* (UCC, GC, UNST Council)
 - * 2. Resolution on class size (EPC/Steering, *cf. item G.3.b*)
 - * 3. Proposed amendment: Budget Committee charge (BC/Steering)
 - * 4. Guidelines for review of non-tenure-track faculty for continuous appointment
(change to Promotion & Tenure Guidelines, *previewed for vote at May meeting*)
- F. Question Period and Communications from the Floor to the Chair
- G. Reports from Officers of the Administration and Committees
 - 1. President's Report
 - 2. Provost's Report

3. Topical reports by Educational Policy Committee
 - * a. Suggestions on academic program review guidelines – *consent agenda*
 - * b. Impact of increasing class size and recommendation for systematic assessment approach (*cf. item E.2*)
- * 4. *Moved to section C above:* Annual Report of the Academic Advising Council
- * 5. Annual Report of the Institutional Assessment Council – *consent agenda*

H. Adjournment

***See the following attachments:**

- B. Minutes of the Senate meeting of 6 March 2017 and appendices – *consent agenda*
- C.1. OAA response to March notice of Senate actions – *consent agenda*
- D.1. WR 228 as writing requirement course
- D.2. Constitutional amendment: AQC membership
- D.3. Constitutional amendment: XO member for PT
- E.1.a,b,c,d. Curricular proposals – *consent agenda*
- E.2. Resolution on class size (*cf. G.3.b*)
- E.3. Proposed amendment on BC charge
- E.4. MOU on NTTF review guidelines
- G.3.a. EPC report on APR guidelines – *consent agenda*
- G.3.b. EPC report on class size (*cf. E.2*)
- G.4. Annual Report of AAC and appendix
- G.5. Annual Report of IAC – *consent agenda*

PORTLAND STATE UNIVERSITY FACULTY SENATE, 2016-17

STEERING COMMITTEE

Brad Hansen, Presiding Officer

Michael Clark, Presiding Officer Elect • Gina Greco, Past Presiding Officer
Committee Members: Michele Gamburd (2017) • Alan MacCormack (2017)

Steve Harmon (2018) • David Raffo (2018)

Ex officio: Richard Beyler, Secretary to the Faculty • Catherine de Rivera, Chair, Committee on Committees
Maude Hines, IFS Rep. (to December) and Board of Trustees Member • José Padín, IFS Rep. (from January).

****FACULTY SENATE ROSTER (64)****

All Others (8)

Arellano, Regina	ACS	2017
Harmon, Steve	OAA	2017
Riedlinger, Carla	CAP	2017
*Burgess, David (for Running)	OIRP	2018
Kennedy, Karen	ACS	2018
<i>Blekic, Mirela</i>	ACS	2019
†O'Banion, Liane	TLC	2019
<i>Walsh, Michael</i>	HOU	2019

CLAS – Arts and Letters (7)

†Childs, Tucker	LIN	2017
Clark, Michael	ENG	2017
Greco, Gina	WLL	2017
†Epplin, Craig	WLL	2018
Jaén Portillo, Isabel	WLL	2018
<i>Brown, Kimberley</i>	LIN	2019
<i>Reese, Susan</i>	ENG	2019

CLAS – Sciences (8)

*Ruedas, Luis (for Elzankowki)	BIO	2017
Stedman, Ken	BIO	2017
†de Rivera, Catherine	ESM	2018
†Flight, Andrew	MTH	2018
Webb, Rachel	MTH	2018
<i>Cruzan, Mitchell</i>	BIO	2019
<i>Mitchell, Drake</i>	PHY	2019
<i>Podrabsky, Jason</i>	BIO	2019

CLAS – Social Sciences (6)

†Gamburd, Michele	ANT	2017
Schuler, Friedrich	HST	2017
Chang, Heejun	GGR	2018
*Robson, Laura	HST	2018
<i>Luckett, Thomas</i>	HST	2019
†Schechter, Patricia	HST	2019

College of the Arts (4)

†Babcock, Ronald	MUS	2017
Hansen, Brad	MUS	2017
*de la Cruz (for Wendl)	COTA	2018
<i>Fiorillo, Marie</i>	COTA	2019

* Interim appointment

† Member of Committee on Committees

New senators in italics

Date: 9 January 2017

College of Urban and Public Affairs (6)

†Schrock, Greg	USP	2017
Yesilada, Birol	POL	2017
*Bluffstone, Randall	ECN	2018
Harris, G.L.A.	PAD	2018
<i>Nishishiba, Masami</i>	PAD	2019
<i>Smallman, Shawn</i>	IGS	2019

Graduate School of Education (4)

De La Vega, Esperanza	CI	2017
*Thieman, Gayle (for Mukhopadhyay)	CI	2017
Farahmandpur, Ramin	ELP	2018
<i>Yeigh, Maika</i>	CI	2019

Library (1)

†Bowman, Michael	LIB	2017
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Maseeh College of Eng. & Comp. Science (5)

Maier, David	CMP	2017
Monsere, Christopher	CEE	2018
†Tretheway, Derek	MME	2018
<i>Recktenwald, Gerald</i>	MME	2019
Siderius, Martin	ECE	2019

Other Instructional (4)

MacCormack, Alan	UNST	2017
†Camacho, Judy	IELP	2018
*Fernandez, Oscar	UNST	2018
<i>Carpenter, Rowanna</i>	UNST	2019

School of Business Administration (4)

Raffo, David	SBA	2017
*Hansen, David (for Dusschee)	SBA	2018
<i>Shin, Shung Jae</i>	SBA	2019
†Sorensen, Tichelle	SBA	2019

School of Public Health (2)

*Gelman, Sherril	HMP	2018
†Messer, Lynne	CH	2019

School of Social Work (5)

†Donlan, Ted	SSW	2017
Taylor, Michael	SSW	2017
*Constable, Kate (for Talbott)	SSW	2018
Winters, Katie	RRI	2018
<i>Bratiotis, Christiana</i>	SSW	2019

PORTLAND STATE UNIVERSITY

Minutes of the Faculty Senate Meeting, 6 March 2017

Presiding Officer: Brad Hansen

Secretary: Richard H. Beyler

Members Present:

Babcock, Blekic, Bluffstone, Bowman, Brown, Camacho, Carpenter, Chang, Clark, Constable, Cruzan, De La Vega, de Rivera, Donlan, Fernandez, Fiorillo, Flight, Gamburd, Gelmon, Greco, B. Hansen, D. Hansen, Harmon, Harris, Kennedy, Luckett, MacCormack, Maier, Messer, Mitchell, Nishishiba, Podrabsky, Raffo, Riedlinger, Robson, Schechter, Schrock, Siderius, Smallman, Sorensen, Stedman, Thieman, Tretheway, Walsh, Webb, Winters, Yeigh, Yesilada

Alternates Present:

Janet Cowal for Childs, Pat Burk for Farahmandpur, Steve Thorne for Jaén Portillo, Maude Hines for S. Reese, Stephanie Bryson for Taylor

Members Absent:

Arellano, Bratiotis, Burgess, de la Cruz, Epplin, Monsere, O'Banion, Recktenwald, Ruedas, Schuler, Shin

Ex-officio Members Present:

Allen, Andrews, Baccar, Bangsberg, Bettridge, Beyler, Chan, Hines (also as alternate), Jhaj, Lafferriere, Marrongelle, Moody, Percy, K. Reynolds, Sanders, Suarez, Woods

A. ROLL

The meeting was called to order at 3:03 p.m.

B. APPROVAL OF THE MINUTES

A correction was made to the Minutes as circulated in the Packet: on p. 28, item 4, paragraph 1, line 1, for "D. HANSEN" read "B. HANSEN." There having been no other objections prior to the end of roll call, the **6 February 2017 Minutes** were **approved** as part of the **consent agenda**.

C. ANNOUNCEMENTS AND DISCUSSION

1. OAA concurrence to February Senate actions was **received as part of the **consent agenda** [see **March Agenda Attachment C.1**].**

2. Announcements by the Presiding Officer

B. HANSEN encouraged senators to use the Google Groups or other means to communicate to faculty about what is happening in Senate.

3. Announcements by the Secretary

BEYLER asked that any problems with the Google Groups be reported to him.

He called attention to the upcoming Faculty Committee Preference Survey and the Opt-In Survey for elections.

BEYLER reminded senators that the Constitution stated that the second Monday of the month was also to be held open for Senate meetings. We would try to get through

upcoming busy agendas in the regular monthly meeting, but if necessary a second meeting would be held.

Presidential finalists were scheduled to be on campus in the upcoming couple of weeks. An announcement with schedule details had been sent to the campus community.

4. Discussion. Liberal education at PSU: what do we stand for?

B. HANSEN stated that the discussion topic was not an official report of the Ad-Hoc Committee on Liberal Education, but grew out of the ongoing conversations within that committee. He recognized the co-chair of the committee, Maurice HAMINGTON, who introduced the topic along with GRECO (co-chair) and WEBB (committee member). [For slides, see **Appendix C.4.**]

HAMINGTON noted that liberal education was the subject of the 2016 Winter Symposium; interest in this subject led Senate to establish an ad-hoc committee later that spring. The committee wished to check in with Senate and ask for views on crafting a statement on liberal education at PSU.

HAMINGTON said that liberal education faced a number of challenges. Social challenges included a narrative that education should be primarily about getting a job. Economic challenges included students' limited financial resources and hence decisions to take only the necessary courses. Some political forces were questioning liberal education, or monitoring ways that liberal education was talked about. Internal structural issues such as the status of transfer students, budgetary procedures, promotion and tenure expectations, and academic silos also swirled about liberal education.

The previous PSU mission statement, HAMINGTON said, explicitly mentioned liberal education. The current mission statement, however, does not. This raised the question, should Faculty Senate create such a statement?

HAMINGTON reviewed several definitions of liberal education. One area of interest was the overlap between "general" and "liberal" education, with the latter generally taken to include education in the majors. At PSU, University Studies defined its work around four learning outcomes and associated rubrics. Many institutions have developed their own definitions. If we go down the road of crafting a statement, we may want to borrow some of this language, but we also want to think about what is particular to the PSU context. In regard to liberal education, what do we stand for? Should Senate create a statement about liberal education? If so, what should be its language?

RAFFO/HARMON **moved** that Senate resolve into a **committee of the whole**; the motion was **approved** by unanimous voice vote (at 3:22).

Points raised in the discussion included: the scope of the term, integrative learning, the importance of basic skills and dispositions, the relationship to vocational or professional education, the student perspective, academic freedom, and the significance of structural issues such as the transfer student population, the tuition plateau, and budgeting models.

D. HANSEN/RAFFO **moved** that the Senate return to **regular session**; the motion was **approved** by unanimous voice vote (at 3:54).

D. UNFINISHED BUSINESS

None.

E. NEW BUSINESS

1. Curricular proposals

The new courses, changes to courses, and changes to programs listed in **March Agenda Attachment E.1** were **approved** as part of the **consent agenda**, there having been no further objection before the end of roll call.

2. Revision of UNST diversity goal

GAMBURD/BOWMAN **moved** the revision to the University Studies diversity learning goal as stated in **March Agenda Attachment E.2**, viz.:

Diversity, Equity and Social Justice

Students will explore and analyze identity, power relationships, and social justice in historical contexts and contemporary settings from multiple perspectives.

BETTRIDGE, chair of the University Studies Council, recognized members of the revision subcommittee who were present: Pedro FERBEL-AZCARATE (BST), Michael LUPRO (UNST), and Kim WILLSON-ST. CLAIR (LIB). [Others members were Randy SPENCER (PHL) and Joseph SMITH-BUANI (BST).]

GAMBURD thanked the group for their hard work, and said that the changes captured new concepts in the social sciences over the last decade or so. She said that it was concise and to the point, and that it would help her as an instructor.

The **motion was approved** (46 yes, 2 no, 1 abstain, vote recorded by clicker).

3. Undergrad SYSC courses to be given academic area designations

MACCORMACK, chair of the Academic Requirements Committee, provided background on the question. Systems Science had only recently started to offer undergraduate (400-level) courses. These were the only courses within the College of Liberal Arts and Science that did not have a designation of social science, science, or arts and letters for purposes of meeting the BA/BS requirements. ARC, noticing this, approached SYSC, who proposed an allocation of courses (including all three areas); the proposal had been reviewed by the Dean of CLAS and by ARC.

HARMON/DE RIVERA **moved** the allocation of courses to academic distribution areas as given in **March Agenda Attachment E.3**.

HARMON observed that for most programs, there was a default designation. What was the default here? MACCORMACK noted that there were several programs that had courses in more than one area: Black Studies, Geography. HARMON clarified his question: what would happen with new courses? MACCORMACK assumed that the designation would be part of the new course proposal. He recognized Wayne WAKELAND, chair of SYSC, who asked if this would be done by curricular committees. MACCORMACK stated that both UCC and ARC had declined to take on the task, and thus he assumed it should be part of the course proposal.

WEBB asked what distinguished game theory in MTH from game theory in SYSC. WAKELAND said the SYSC course was taught in a very general way, and did not take a mathematical approach. WEBB suggested that the similarity in names would be confusing to a student, who would not realize that the two courses were quite different in content. MAIER: why did MTH name their course the same as SYSC's? B. HANSEN observed that this raised the issue of potential overlap. WAKELAND said he thought the MTH course title was "Mathematical Theory of Games"—it was distinct. The SYSC course was on the fence between science and social science. MACCORMACK observed that such conversations were subject to ongoing discussion, but that for the sake of students some resolution had to be made.

ARELLANO observed that many were UNST cluster courses, but not all. Would these be added? MACCORMACK said that was not ARC's call.

BLUFFSTONE asked how often the courses were offered. MACCORMACK: regularly. WAKELAND: with the exception of the game theory course, whose scheduling was coordinated with MTH, most were offered either a couple of times per year, every year, or every other year. KENNEDY said that it was difficult, when advising students, if courses on a list of options were not available regularly. MACCORMACK said that enrollments might not justify a more frequent offering. B. HANSEN observed that there were multiple options available. It was asked if a listing of the rotation of courses was available. WAKELAND pointed to the course planning guide, which SYSC tried to stick to. KENNEDY observed that there was sometimes a disparity between the apparent richness of possibilities and the actual availability of courses to students. BACCAR indicated that the course planning guide was being expanded to include projections beyond one year. KENNEDY also hoped for inclusion of summer term offerings.

DE LA CRUZ asked about how the courses were put into, say, the science group. MACCORMACK pointed to the course descriptions in the packet.

The **motion was approved** (41 yes, 4 no, 3 abstain, vote recorded by clicker).

4. **WR 228 to qualify as a University writing requirement course**

MACCORMACK introduced the proposal to include WR 228, Media Writing, on the list of courses that fulfill the University's writing requirement. The packet item [**March Agenda Attachment E.4**] also included a statement by the Chair of English.

D. HANSEN/DE RIVERA **moved** the addition of WR 228 to the list, as stated in **Attachment E.4**.

GAMBURD referred to a discussion in Steering Committee about whether this course provided for teaching sustained writing—or was only short-format writing part of the course? GRECO said that the syllabus did not contain sustained writing, but mostly rather short pieces up to 250 words. CLARK said that he did not recall the trajectory of this proposal. He said that GAMBURD's question was apropos. His view was that it might be wise to hear from someone involved in the design of the course.

D. HANSEN noted that the course was repeatable. Did this mean that it could be taken twice to fulfill the writing requirement? MACCORMACK said that ARC's interpretation of the rule was that two different courses from the list were required to fulfill the

University writing requirement. The question at hand, however, was not whether the course could be taken twice, but rather its inclusion or not on the list.

CLARK said that the English Department had discussed how to integrate new media into writing instruction. He would still like to hear how this was conceptualized here.

HINES (for S. Reese)/GRECO **moved to postpone the motion**, which was **approved** (by majority show of hands).

5. Proposed amendment: membership of AQC

BEYLER noted that amendments to the Faculty Constitution were introduced at one meeting and voted on (along with any proposed alterations) at the next meeting.

B. HANSEN gave the background to the proposed amendment regarding membership of the Academic Quality Committee [**March Agenda Attachment E.5**]. This committee had been based on a previously existing task force; however, the language regarding the composition of the committee did not conform to the pattern for other standing Faculty Senate committees. The chair, Linda GEORGE, had also indicated it would be useful to have more faculty participation—hence an increase in membership was proposed. Some language in the committee charge was also clarified.

6. Proposed amendment: part-time ex-officio member of Faculty Senate

BEYLER described the proposed amendment [**March Agenda Attachment E.6**]: it would provide for formal ex-officio representation in Faculty Senate for part-time (adjunct) instructional faculty. Ex-officio members currently included various administrators, the Secretary to the Faculty, and [constitutional] committee chairs [who were not already senators]. They could make motions and participate in discussions without further recognition; they were not voting members. The process would be an opt-in followed by an election, similar to the current process for Faculty Senate elections.

WEBB asked whether the term “instructor” included “senior instructor.” BEYLER indicated that the wording in the proposed amendment was taken from the existing language in [Article II] defining membership in the Faculty. The interpretation had been that the term “instructor” there included all ranks including that term. “Instructor” was, however, a designation of academic rank and not a qualitative job description. D. HANSEN asked whether the definition included only these ranks. BEYLER reiterated that this wording in the amendment was lifted from extant wording in the Faculty Constitution. HANSEN suggested that this wording was inconsistent with current promotion and tenure guidelines, which included ranks designations such as professor of practice, research professor, and senior instructor. BEYLER stated that his understanding was that the definition had been interpreted to include all these ranks, e.g., “professor” included “professor of practice.” HANSEN: rank families, as it were. BEYLER: yes.

F. QUESTIONS TO ADMINISTRATORS & COMMUNICATIONS FROM THE FLOOR

None.

G. REPORTS FROM ADMINISTRATORS AND COMMITTEES

1. President’s Report

[Since WIEWEL was traveling, the President’s Report fell out of the agenda.]

2. Provost's Report

[See **Appendix G.2** for an outline.]

ANDREWS reported that a way to implement credit for prior learning (CPL) had been developed. Senate had previously approved changes to the CPL policy regarding eligibility, credit limits, reporting on transcripts, repeat policy, residency requirements, and unit/departamental determinations of what kinds of credits could be included and the permissions required. When departments approved CPL, it would generate a fee which would go to the college in question. The Office of Academic Innovation could provide support for faculty who wanted to offer CPL credit. She stated that BACCAR had shared this proposal with various committees, including EPC, UCC, and ARC.

GRECO: if the department incurs direct costs for CPL, is there a way for the department to recover this? ANDREWS said that the fee would go to the college, but her assumption would be that the college would work with departments to figure out how work assignments would be handled. GRECO noted that in the case of her department [WLL], much of this work would fall to adjuncts and thus require extra pay.

D. HANSEN asked when the policy was shared with EPC. JHAJ said that the policy had been developed by Faculty Senate. HANSEN clarified: the implementation plan. BACCAR said she had sent this by e-mail to the chairs of these committees recently. B. HANSEN observed that the group that defined the implementation did not include faculty, and that their contribution would have been helpful.

ANDREWS mentioned the faculty and staff excellence awards. There were sometimes very few nominations; she urged faculty to acknowledge the work of their colleagues in this way.

ANDREWS said that schools and colleges had submitted their strategic enrollment management plans, narratives, and research management plans to OAA [Office of Academic Affairs]. Budget Committee had reviewed these and provided feedback, as had teams from various administrative units. March 10th was deadline for colleges to modify their plans. OAA then would look at them in aggregate, and bring the results with the Budget Committee for their input. The budget for the various schools and colleges would then be set in mid to late April. There will be reductions in some places; they are also looking at what areas within OAA can grow.

The Provost's Lecture Series was underway, with two terrific presentations so far.

ANDREWS reminded faculty of nominations for student speakers for commencement.

She finally indicated that EVERETT (Vice Provost for International Affairs) would be issuing a statement to department chairs about the recent executive order regarding immigration. It was still generating concern for many universities, and there seemed to be an effect on the number of international applications.

3. Report by Vice Provost for Finance and Administration

The report by K. REYNOLDS was a summary of a longer presentation for an upcoming town hall about the budget context and planning for FY18 (fiscal year 2018). [For slides, see **Appendix G.3.**] Overview: the Education and General (E&G) fund includes tuition and state support, which drives salaries and benefits for faculty, etc. Fees are applied to

specific operating expenses. Grant funding is applied to direct costs associated with the grant activity, but an overhead amount (around 20-22%) is put into the E&G fund. Non-E&G budget includes parking, housing, sales, etc. From these funds we have normal operating expenditures, and building and equipment reserves; again, there is an administrative overhead.

The general fund allocation, REYNOLDS said, is about \$295 million. The bulk of this goes to OAA; the next highest proportion to Finance and Administration (FADM), which includes OIT, HR, Campus Public Safety, Finance and Accounting, and Facilities. If there is a revenue shortfall, the impact lies primarily on OAA and FADM. Research and Strategic Partnerships is a small proportion of that.

The University currently has a balanced budget. For FY18, REYNOLDS said, there is anticipated a decline in net tuition (difference between what we charge students and any discounting) because of a decline in enrollment, and potentially in state allocation. There will be an increase in personnel costs, including a significant increase in health care and retirement costs. He posited a gap of \$20 million.

REYNOLDS noted a steady decline in enrollment. This has been ameliorated somewhat by a changing ratio between non-resident and resident students. An OIRP study saw, as the most optimistic scenario, essentially a flat enrollment for the near future, but possibly a 2-3% decline.

In state appropriations there had been a reduction in 2011, but some increases since then. Right now, REYNOLDS said, the governor's recommended budget was flat for public universities. We would advocate strongly for improved state funding.

As significant cost drivers, REYNOLDS pointed to wages and benefits, with the biggest being retirement costs: the PERS liability. Employee contribution rates are going up about 4 percentage points per year, probably for the next two biennia. MAIER [referring to the slides, **Appendix G.3**], asked what the term CSL meant. REYNOLDS: current service level—essentially, the inflationary cost of offering service at the present level of service. The projection includes an estimation of the impact of minimum wage and graduate tuition remissions; not included is compression, nor negotiations with the graduate employee union. Altogether, REYNOLDS said, there are about \$14 million in cost drivers for the next biennium. Retirement costs for FY18 are 24%, and are projected to increase to 30%.

BLUFFSTONE asked if University reserves included an allocation for retirement costs. REYNOLDS answered no, the state charges us an allocation for current employees.

REYNOLDS then asked how the difference (around \$20 million) could be covered. It is probably best to use a combination of tuition increases and budget cuts. It is likely that tuition increases will be around 9% for resident and 5% for non-resident students. Vice presidents have been asked to make contingency planning, identifying around \$8 million in savings: some in personnel reductions, some in structural savings. Not all divisions spend all of their allocated funds; if this can be accounted for at the divisional level, it can be part of the overall approach to closing the gap.

A few weeks ago REYNOLDS walked through several scenarios with the Finance and Administration Committee of the Board of Trustees. All scenarios led to an increase in

the University's budget, but below the expected inflationary pressures. If the tuition increase was 5%, this would mean a budget increase across the University of 1.2% but a shortfall of \$13 million given the expected cost drivers. REYNOLDS believed that was not feasible for the University. A 9% tuition increase would mean a budget increase of around 1.7%, and a shortfall of around \$9 million (the delta between increased budget and inflationary pressures). The largest impact would come in OAA and FADM. The budget guidance principles were approved by the F&A Committee of the Board of Trustees, and corresponding guidance has gone to each of the vice presidents. There are still many variables: enrollment growth and mix; final tuition rates; state allocation. It is possible that we may be successful in gaining more state funding, but the state is also confronting its own shortfall.

SMALLMAN wondered if increasing tuition might end up costing money by driving down demand. Was there modelling? REYNOLDS said that the projections already reckoned with a possible enrollment decline. He observed that over the previous ten years, even when there had been tuition increases, enrollment had also increased. This seemed counterintuitive, and he admitted that might not happen again. The relationship to the recession and unemployment was probably significant. They were studying the effects of student debt, and how to handle this strategically. He noted that PSU's tuition was less than University of Oregon's and OSU's, and that with the current projections this gap would only increase.

BROWN asked about the role of the comprehensive campaign. REYNOLDS said that the comprehensive campaign was not addressed at cost drivers, but rather at funding for new faculty and student scholarships. Scholarship funding would help address problems created by tuition increases. B. HANSEN asked about philanthropy for the various colleges. REYNOLDS said that PSU Foundation activities were not reflected here, but that perhaps such activities might allow a reallocation of various parts of the budget. He recognized Andria JOHNSON to answer further: the Foundation's activities did not flow the University's books but were kept separate. B. HANSEN: if people wanted to donate to help students, what would be the incentive? REYNOLDS: scholarships, to help students deal with the rising cost of tuition. JOHNSON: the Foundation makes clear the amount of support they give to the University; in 2016, it was around \$26 million, mostly in form of scholarships and support to faculty members.

4. Quarterly Report of the Budget Committee

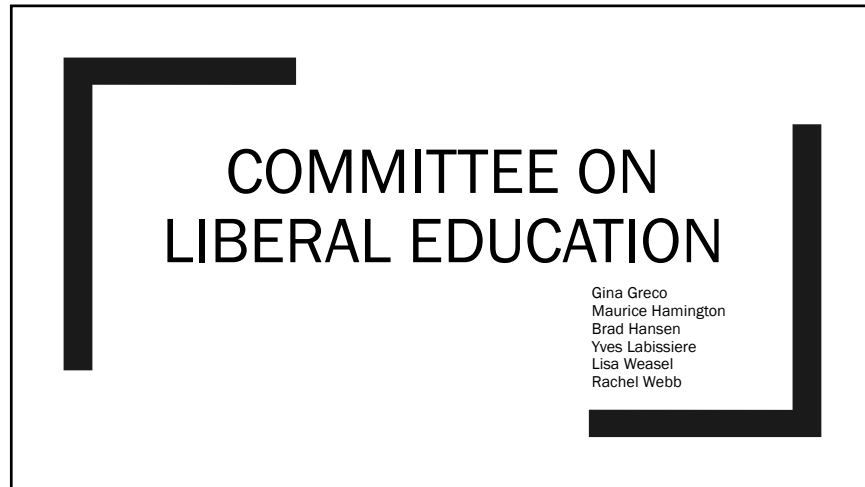
The winter term report of the Budget Committee was **received** as part of the **consent agenda** [see **March Agenda Attachment G.4**].

5. Quarterly Report of the Educational Policy Committee

The winter term report of the Educational Policy Committee was **received** as part of the **consent agenda** [see **March Agenda Attachment G.5**].

H. ADJOURNMENT

The meeting was **adjourned** at 5:00 p.m.



COMMITTEE ON LIBERAL EDUCATION

Gina Greco
Maurice Hamington
Brad Hansen
Yves Labissiere
Lisa Weasel
Rachel Webb

Challenges Facing Liberal Arts Education

- **External**
 - *Social*
 - *Economic*
 - *Political*
- **Internal**
 - *Transfer Students*
 - *Budget*
 - *Silos*

PSU Mission, approved by State Board of Education in 1997 Same Mission, approved by PSU Board of Trustees, April 2014

The mission of Portland State University is to enhance the intellectual, social, cultural, and economic qualities of urban life by providing **access throughout the life span to a quality liberal education** for undergraduates and an appropriate array of professional and graduate programs especially relevant to metropolitan areas. The University conducts research and services that support a high quality educational environment and reflect issues important to the region. It actively promotes the development of a network of educational institutions to serve the community.

New Mission, approved by Board of Trustees, April 2016

- We serve and sustain a vibrant urban region through our creativity, collective knowledge and expertise.
- We are dedicated to collaborative learning, innovative research, sustainability and community engagement.
- We educate a diverse community of lifelong learners.
- Our research and teaching have global impact.

March Minutes Appendix C.4

Liberal Education defined (American Association of Colleges and Universities)

- **Liberal Education:** An approach to college learning that empowers individuals and prepares them to deal with complexity, diversity and change. It emphasizes broad knowledge of the wider world (e.g., science, culture and society) as well as in-depth achievement in a specific field of interest. It helps students develop a sense of social responsibility as well as strong intellectual and practical skills that span all areas of study, such as communication, analytical and problem-solving skills, and includes a demonstrated ability to apply knowledge and skills in real-world settings.
- **General Education:** The part of a liberal education curriculum shared by all students. It provides broad exposure to multiple disciplines and forms the basis for developing important intellectual and civic capacities.

Original General Education Goals at PSU Defined in 1994 for University Studies

1. **Inquiry and Critical Thinking** - Provide an integrated educational experience that will be supportive of and complement programs and majors and which will contribute to ongoing, lifelong inquiry and learning.
2. **Communication** - Provide an integrated educational experience that will have as a primary focus enhancement of the ability to communicate what has been learned.
3. **Human Experience** - Provide an integrated education that will increase understanding of the human experience. This includes emphasis upon scientific, social, multicultural, environmental, and artistic components to that experience and the full realization of human potential as individuals and communities.
4. **Ethical Issues and Social Responsibility** - Provide an integrated educational experience that develops an appreciation for and understanding of the relationships among personal, societal, and global well-being and the personal implications of such issues as the basis of ethical judgment, societal diversity, and the expectations of social responsibility.

Current General Education Goals at PSU

- **UNST Communication Goal:** Students will enhance their capacity to communicate in various ways—writing, graphics, numeracy, and other visual and oral means—to collaborate effectively with others in group work, and to be competent in appropriate communication technologies.
- **The Diversity of Human Experience:** Students will enhance their appreciation for and understanding of the rich complexity of the human experience through the study of differences in ethnic and cultural perspectives, class, race, gender, sexual orientation, and ability.
- **Ethics and Social Responsibility:** Students will expand their understanding of the impact and value of individuals and their choices on society, both intellectually and socially, through group projects and collaboration in learning communities.
- **Inquiry and Critical Thinking:** Students will learn various modes of inquiry through interdisciplinary curricula—problem-posing, investigating, conceptualizing—in order to become active, self-motivated, and empowered learners.

Aspirational Examples of Goals for Liberal Education at PSU

- "...committed to the idea of a liberal arts education through which students think and learn across disciplines, literally liberating or freeing the mind to its fullest potential. The essence of such an education is not what you study but the result – gaining the ability to think critically and independently and to write, reason, and communicate clearly – the foundation for all professions." (*Yale University*)
- "...facilitates the development of mental agility, intellectual power, an understanding and appreciation of diversity, ethical issues, service to others, and critical thinking skills...the means by whereby human beings come to understand themselves and the world in which they live... encourages a lifetime quest for active learning." (*Ohio University*)
- "Communicate compellingly; understand other cultures and civilizations, past and present; understand different forms of scientific thought and evidence; understand creative products of the human imagination; evaluate, manage, and interpret information." (*Duke University*)

WHAT DO WE STAND FOR?

HOW SHOULD WE DEFINE
LIBERAL EDUCATION AT PSU?

Concrete Examples of Goals for Liberal Education at PSU

- **Literacy:** ability to read, comprehend, and communicate effectively in various modes
- **Numeracy:** ability to calculate and quantify; to solve mathematical problems
- **Critical Thinking:** ability to validate and prioritize information to make sound decisions
- **Contextual Knowledge:** knowing historical, social, and geographic contexts for events
- **Creative and Aesthetic:** ability to express original ideas; to appreciate various art forms
- **Scientific Methodology:** applying scientific modes of inquiry to a range of problems
- **Social Responsibility:** valuing the importance of sustainability and community service
- **Cross-Cultural Competence and Multicultural Diversity:** Understanding and working within and across cultural differences, diversity, etc.

(Some of these are better seen as Learning Outcomes.)

March Minutes Appendix G.2

PROVOST ANDREWS' COMMENTS: MARCH 6, 2017 FACULTY SENATE MEETING

CPL (CREDIT FOR PRIOR LEARNING)

We have worked out details to implement the Senate approved policy that allow departments to decide CPL offerings. The revenue generated from CPL will be attributed to the respective college. There will be a toolkit for chairs and OAI will support faculty developing CPL options for courses.

FACULTY AND STAFF EXCELLENCE AWARDS

- [Call for nominations](https://www.pdx.edu/academic-affairs/call-for-nominations-excellence-awards) (https://www.pdx.edu/academic-affairs/call-for-nominations-excellence-awards)
- Deadline: Friday, March 17, 2017 for the nomination name; Friday, April 21, 2017 to complete the nomination

OAA BUDGET

- Status: [Integrated Planning and Budget](#)
February OAA Winter Budget Forum slides on IPEB website

PROVOST'S OFFICE LECTURE SERIES

The [lectures](#) are held on **Thursdays, from 2:00-3:00 p.m. in Hoffmann Hall**. Open to all students, faculty and staff at PSU. Begins Feb 23.

March 9 - **Marc Rodriguez**: *Latinos and the Future of American Politics: Some Reflections from History*

March 16 - **Randall Bluffstone**: *When Academics Take Policy Positions*

April 6 - **James Russell**: *The Future of Social Security and Medicare in the Age of Trump*

April 13 - **Chia Yin Hsu and Cassio de Oliveira**: *Russian Involvement in the Elections: Kompromat, Ideology, and the Role of the State*

April 20 - **Jason Jurjevich**: *Who Votes for Mayor? Voter Turnout for Mayoral Elections in America's Largest Cities*

COMMENCEMENT

- **Student speaker recruitment**: Encourage undergraduate and graduate students to [apply](#) to be student commencement speakers.
- **Faculty and staff participation**: A reminder that the AAUP/University CBA requires all tenured faculty to attend the university-wide commencement ceremony. The committee is always looking for Saturday AND Sunday volunteers. Volunteers can sign up at the [commencement volunteer website](#) where there is a [volunteer form](#).
- **Commencement Provost Challenge** prize to the unit with the greatest percentage faculty participation
- **Future commencement planning**

NEXT SECOND THURSDAY SOCIAL CLUB: March 9, 4:00 – 6:30 pm, held in the Office of Academic Innovation

FACULTY BRING YOUR LUNCH EVERY TUESDAY GATHERING: 11 am – 2pm at Simon Benson House

My Blog: psuprovostblog.com

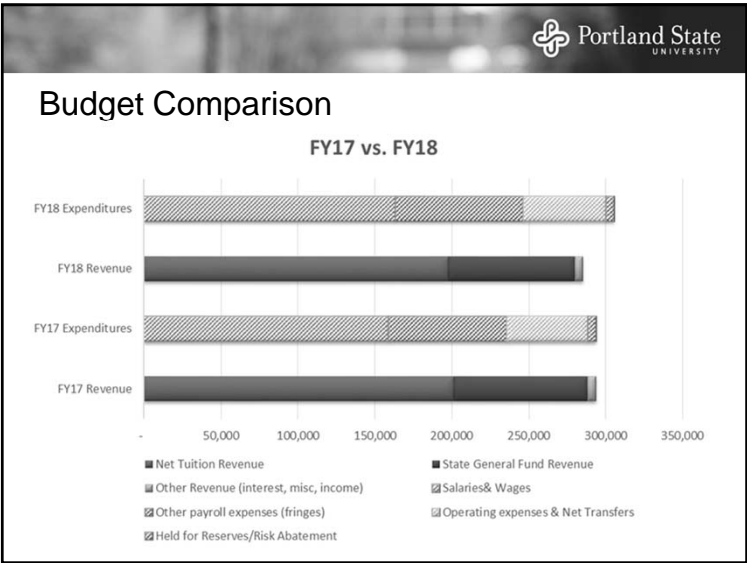
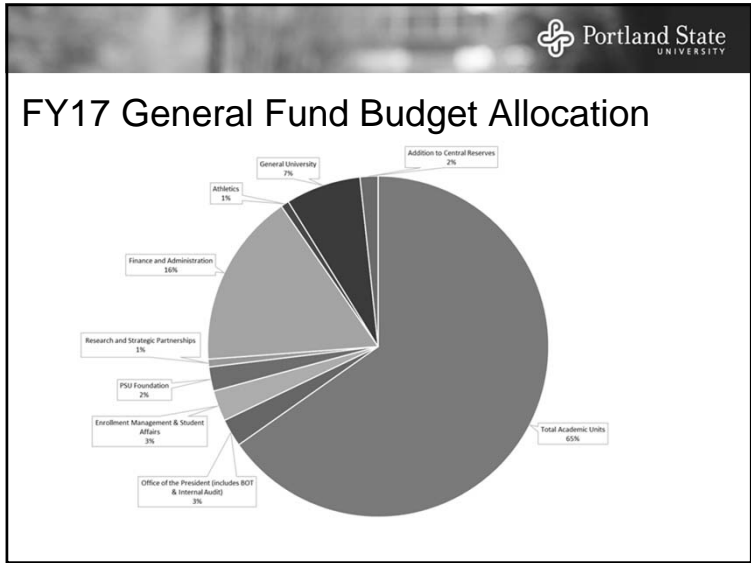
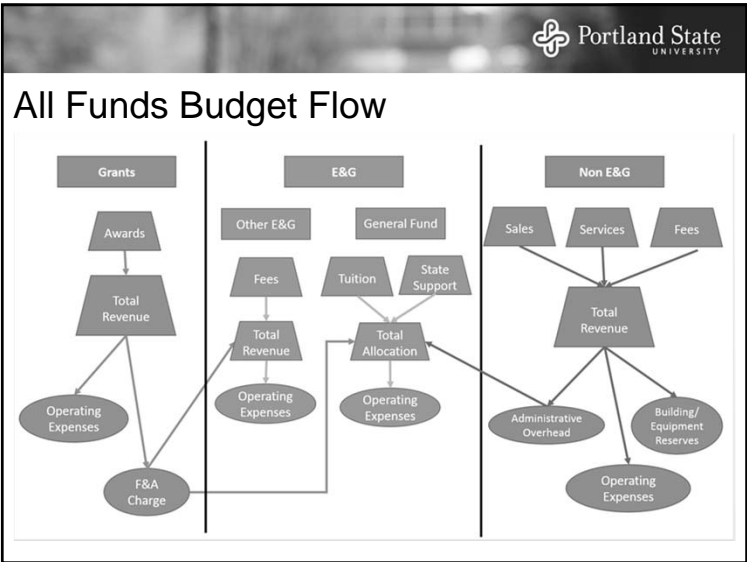
March Minutes Appendix G.3

Faculty Senate FY18 Budget Update

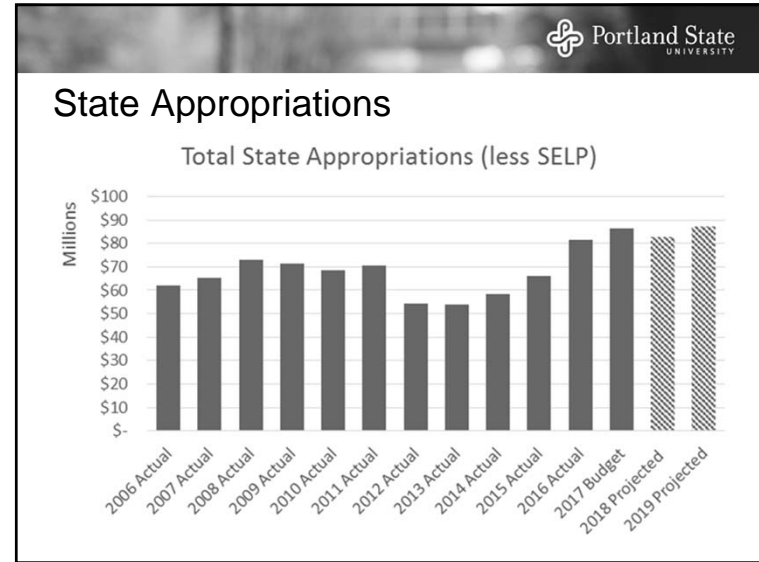
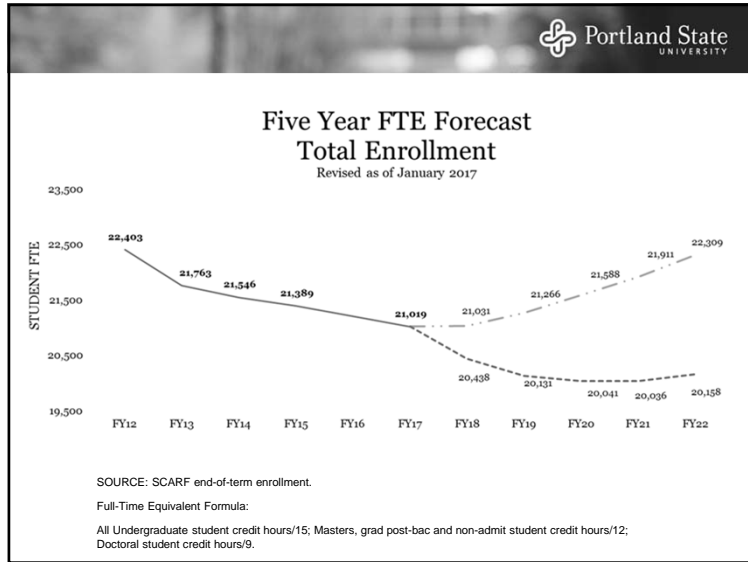
March 6, 2017



 Portland State UNIVERSITY



March Minutes Appendix G.3

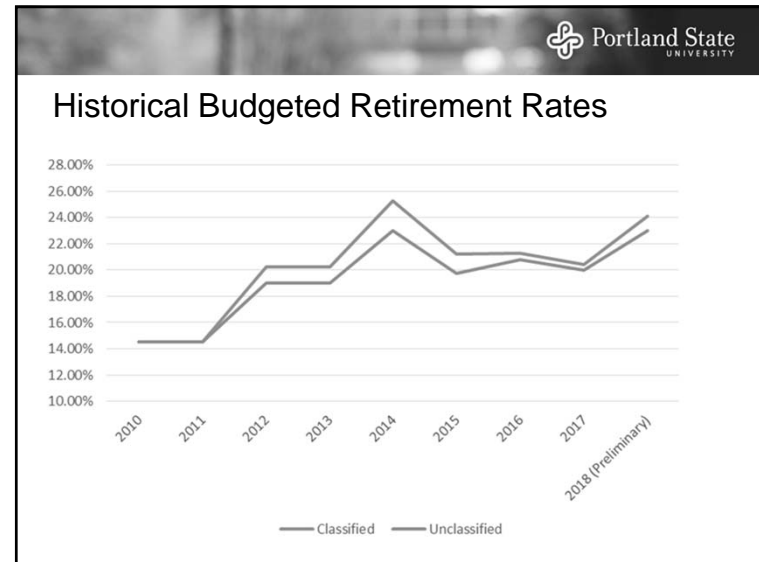


CSL - Based on FY17 General Fund Budget

PBB FY16 Tuition Settle-up	\$1.8 million
Salary and Wages	\$4.1 million
Minimum Wage	\$680 thousand
Health Care (PEBB)	\$447 thousand
Retirement (PERS)	\$5.2 million
Other Payroll Expenses (Taxes)	\$400 thousand
Graduate Assistant Remissions*	\$600 thousand
Services and Supplies Inflation	\$1.1 million
CSL Total	\$14.3 million

CSL for FY18 is budget +4.2%

*Assumes GA Remissions increase at proposed tuition increase of 9%

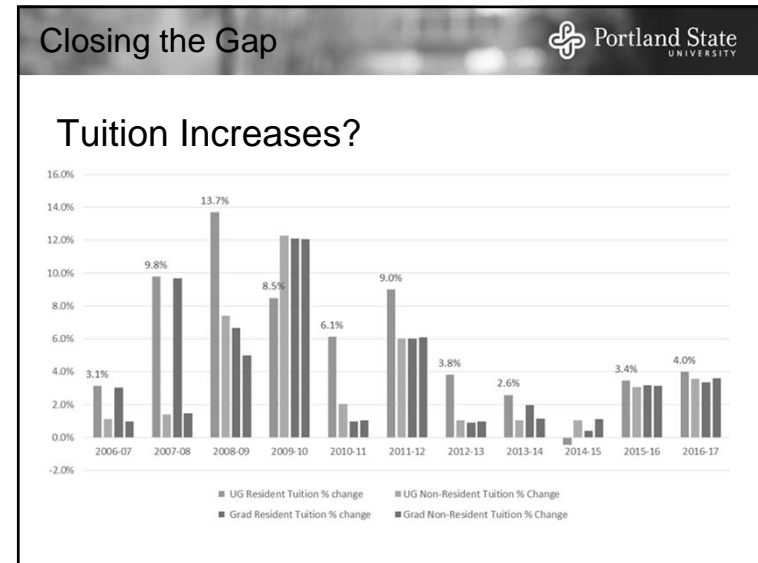


March Minutes Appendix G.3

Portland State UNIVERSITY

A Balanced Budget without tuition increases?

	2015-17 Biennium		2017-19 Biennium	
	FY16 Actual	FY17 Budget	FY18	FY19
Revenues:				
Gross Tuition	214,303	221,400	217,600	217,600
Tuition Remissions	(18,574) <small>-8.7%</small>	(19,896) <small>-9.0%</small>	(19,896) <small>-9.1%</small>	(19,896) <small>-9.1%</small>
Net Tuition	195,730	201,504	197,704	197,704
State General Fund	81,568	86,556	82,101	86,641
Other (interest, misc. income)	5,760	5,348	5,348	5,348
Total Revenues	283,057	293,408	285,153	289,693
Expenditures:				
Salaries & Wages	146,440	158,951	163,692	169,911
Other Payroll Expenses (fringes)	68,227	76,622	82,703	85,940
Operating Expenses & Net Transfers	50,677	52,835	53,914	55,013
Held for Reserves/Risk Abatement		5,000	5,000	5,000
Cuts/Use of Fund Balance			0.0%	0.0%
Total Expenditures & Net Transfers	265,345	293,408	305,308	315,864
Net from Operations and Transfers	17,712	-	(20,155)	(26,171)



Portland State UNIVERSITY

Closing the Gap

Contingency Planning - Fall 2016

Possible Reduction Categories:	
Structural Salary Savings	\$3.5 million
Personnel Reductions	\$2.85 million
Moving Costs to other funding sources	\$510 thousand
Services & Supplies Reduction	\$1.1 million
Total Reductions	\$7.96 million

Portland State UNIVERSITY

FY18 Budget Planning


Scenarios

State Appropriation	Tuition Increase	Budget +	Cut from CSL*
\$620 million	5% All	-1.2%/- \$3.5 million	-\$17.9 million
\$640 million	5% All	-0.4%/- \$1.2 million	-\$15.6 million
\$667 million	5% All	0.4%/ \$1.2 million	-\$13.2 million
\$680 million	5% All	1.2%/ \$3.5 million	-\$10.9 million

State Appropriation	Tuition Increase	Budget +	Cut from CSL*
\$620 million	9% Res/ 5% Non-Res	0.1%/ \$280 thousand	-\$14.1 million
\$640 million	9% Res/ 5% Non-Res	1.0%/ \$2.6 million	-\$11.8 million
\$667 million	9% Res/ 5% Non-Res	1.7%/ \$5 million	-\$9.4 million
\$680 million	9% Res/ 5% Non-Res	2.5%/ \$7.3 million	-\$7.1 million

*Includes \$1.8 million true-up from FY16 tuition revenue shortfall

March Minutes Appendix G.3

FY18 Budget Planning 

Preliminary Internal Budget Guidance

- Budget +1.5% (\$9 million reduction from CSL)

Budget Variables
Enrollment Growth/Mix
Tuition Rates
State Allocation
Additional expenditure reductions



Questions?

Attachment C.1

Office of the Faculty Senate, OAA
Portland State University
P.O. Box 751
Portland, OR 97207-0751



To: Provost Andrews
From: Portland State University Faculty Senate
Brad Hansen, Presiding Officer
Date: 7 March 2017
Re: Notice of Senate Actions

On **6 March 2017 the Faculty Senate approved** the Curricular Consent Agenda recommending the proposed new courses, changes to courses, and changes to programs given in Attachment E.1 to the March 2017 Agenda.

3-7-17—OAA concurs with the recommendation and approves these new courses, changes to courses, and changes to programs.

In addition, the **Faculty Senate voted to approve:**

- A revision to the diversity learning goal of the University Studies program, as stated in Agenda Attachment E.2.

3-7-17—OAA concurs with the recommended revision to the program.

- The allocation of undergraduate Systems Science courses to the various academic distribution areas, as given in Agenda Attachment E.3.

3-7-17—OAA concurs with the recommended allocation of the courses to the academic distribution areas.

Best regards,

A handwritten signature in black ink that reads 'B. Hansen'.

Brad Hansen
Presiding Officer

A handwritten signature in black ink that reads 'Richard H. Beyler'.

Richard H. Beyler
Secretary to the Faculty

A handwritten signature in blue ink that reads 'Sona Andrews'.

Sona Andrews
Provost and Vice President for Academic Affairs

Attachment D.1

Postponed from March, item E.4

WR 228 Media Writing to Qualify as a University Writing Requirement Course ARC Motion for Faculty Senate

The Academic Requirements Committee, the University Writing Committee, and the English Department endorse the following **motion**:

The existing course WR 228 Media Writing shall be added to the list of courses that qualify for the University writing requirement.

Rationale: The following supporting statement is from Paul Collins, Chair of the English Dept.

The requirements entail a minimum of 6000 words, include recursive exercises, a revised final paper, and a process paper to accompany the final revision. In a nutshell, the course has students learn about research, drafting, and revision -- and their subject matter will be the campus community itself, so it will have the additional effect of engaging students more fully in the life of Portland State.

The essentials they'd cover in any iteration of the course are (1) conceptualizing the audience and the story structure through the formats of campus student media, (2) research, both primary sourcing (interviews, field reporting) and the critical reading of documents, and (3) composition, through outlining, drafting, revising, and fact-checking. These are skills that would serve student writers and readers well regardless of whether they continue in news writing or indeed in English; the skills are widely applicable.

Course Description:

WR 228 Media Writing

An introductory course in media reporting and writing. Focus on identifying newsworthiness, writing leads, constructing news stories, interviewing, and attributing quotes. Students learn to gather local news, writing some stories in a computer lab on deadline. Recommended: WR 121 or Freshman Inquiry. May be repeated once for a total of 8 credits.

Attachment D.2

Reviewed in March as item E.5

PROPOSED AMENDMENT TO THE FACULTY CONSTITUTION: COMPOSITION OF ACADEMIC QUALITY COMMITTEE

The Faculty Senate Steering Committee proposes the following amendment to the Faculty Constitution.

Article IV, Section 1.4.4)o) of the Constitution of the Portland State University Faculty is hereby amended by replacing the sentence:

This committee shall consist of six faculty members from across the University and three non-voting members: one student, one representative from OAA, and one representative from OIRP.

with the sentence:

This committee shall consist of nine faculty members from across the University and a non-voting student member. Representatives from OAA, OIRP, and EPC will serve as consultants at the discretion of the committee.

and changing the wording of item 3) in the charge to read:

3) Report on issues, concerns, and potentially actionable ideas.

Rationale:

At the request of the AQC, Steering Committee proposes an expansion of the membership of AQC in order to facilitate its work. The role of consultants is clarified, in parallel to other Faculty Senate standing committees. Wording of one item in the charge is also clarified.

Attachment D.3

Reviewed in March as item E.6

PROPOSED AMENDMENT TO THE FACULTY CONSTITUTION: EX-OFFICIO SENATE REPRESENTATION FOR PART-TIME TEACHING APPOINTEES

The Faculty Senate Steering Committee proposes the following amendment to the Faculty Constitution.

Article V (Faculty Senate), Section 1 (Membership) of the Constitution of the Portland State University Faculty is hereby amended by adding the following text after paragraph 1.1.c):

d) Each spring term, persons who hold teaching appointments at Portland State University with the rank of professor, associate professor, assistant professor, or instructor, and whose full-time equivalent is less than fifty percent, shall elect an ex-officio member for the subsequent academic year.

Rationale:

The amendment provides a formal role in the Faculty Senate, including the right to make motions and participate in discussions and debates without further recognition, for a representative of part-time instructors, who deliver a significant part of the curriculum at PSU.

The wording “persons who hold ... less than fifty percent” parallels language in Article II of the Constitution defining membership in the Faculty.

March 8, 2017

TO: Faculty Senate

FROM: Mark Woods
Chair, Graduate Council

RE: Submission of Graduate Council for Faculty Senate

The following proposals have been approved by the Graduate Council, and are recommended for approval by the Faculty Senate.

You may read the full text for any course or program proposal as well as Faculty Senate Budget Committee comments on new and change-to-existing program proposals by going to the PSU Curriculum Tracking System at <http://psucurriculumtracker.pbworks.com> and looking in the **2016-17 Comprehensive List of Proposals**.

College of Liberal Arts and Sciences

Change to Existing Program

E.1.a.1

- CRTGR in Computer Modeling and Simulation - change to existing program: small changes to core and elective coursework. FSBC: No significant budgetary impact.

E.1.a.2

- CRTGR in Hydrology - change to existing program: update course requirement lists. FSBC: No significant budgetary impact.

E.1.a.3

- MA/MS in Education: Media/Librarianship – eliminate program. FSBC: No significant budgetary impact.

E.1.a.4

- MS in Mathematics for Teachers - change to existing program: slight requirement changes; remove education elective section. FSBC: No significant budgetary impact.

E.1.a.5

- PHD in Systems Science - change to existing program: reduce total credits to 84; other minor requirement changes. FSBC: No significant budgetary impact.

School of Social Work

Change to Existing Courses

E.1.a.6

- SW 515 Skills for the Helping Process – Groups, 3 credits – change co-requisite

E.1.a.7

- SW 530 Skills for the Helping Process – Individuals and Families, 3 credits – change co-requisite

E.1.a.8

- SW 532 Advocacy and Empowerment, 3 credits – change co-requisite

E.1.a.9

- SW 566 Social Work in Child Welfare, 3 credits – change course title to Partnering With and Practicing in Child Welfare

E.1.a.10

- SW 579 Working with Involuntary Clients, 3 credits – change course title to Engaging with the Mandated Client

Maseeh College of Engineering and Computer Science

New Courses

E.1.a.11

- EE 527 Sensor Array Processing, 4 credits
Overview of applications in acoustics and electromagnetism that benefit from sensor array processing. Topics include array geometry design, performance measures, source tracking, passive and active approaches, wave propagation modeling, beamforming, noise modeling, and adaptive methods. Prerequisites: ECE 332 or equivalent, EE 318 or equivalent.

Change to Existing Courses

E.1.a.12

- CS 595/695 Network Routing, 3 credits – drop course

College of Urban and Public Affairs

Change to Existing Programs

E.1.a.13

- MS in Criminology and Criminal Justice – change to existing program: add new core requirement; remove project option and add portfolio and field project options; increase total credits to a minimum of 51. FSBC: No significant budgetary impact.

New Courses

E.1.a.14

- CCJ 545/645 Advanced Topics in Research Methods, 4 credits
Advanced training in select research methodologies practiced in criminology and criminal justice. Topics may include, but are not limited to; survey methods, field methods, advanced statistics, advanced crime analysis, content and document analysis, evaluation research, secondary data analysis, and interviews. Topics will vary yearly. May be repeated once for credit. Prerequisites: CCJ 520 and CCJ 530.

March 8, 2017

TO: Faculty Senate

FROM: Mark Woods
Chair, Graduate Council

Robert Sanders
Chair, Undergraduate Curriculum Committee

RE: Consent Agenda

The following proposals have been approved by the Graduate Council and the Undergraduate Curriculum Committee, and are recommended for approval by the Faculty Senate.

You may read the full text for any course or program proposal as well as Faculty Senate Budget Committee comments on new and change-to-existing program proposals by going to the PSU Curriculum Tracking System at <http://psucurriculumtracker.pbworks.com> and looking in the **2016-17 Comprehensive List of Proposals**.

College of Liberal Arts and Sciences

Change to Existing Courses

E.1.b.1

- BST 411/511 African American History Seminar, 4 credits - change course description; change prereqs; change repeatability

E.1.b.2

- G 438/538 Scanning Electron Microscopy in the Biogeosciences, 4 credits - change course title to Applied Scanning Electron Microscopy; change course description

E.1.b.3

- GEOG 497/597 Spatial Quantitative Analysis, 4 credits - change course title to Advanced Spatial Quantitative Analysis; change course description

E.1.b.4

- HST 495/595 Comparative World History, 4 credits - change course number to HST 490/590; change course description; change prereqs

E.1.b.5

- HST 496/596 Introduction to Public History, 4 credits - change course number to HST 493/593; change course description; change prereqs

E.1.b.6

- MTH 494/594 Arithmetic and Algebraic Structures for Middle School Teachers, 3 credits - change course description; change credit hours to 4; change online hours

E.1.b.7

- MTH 495/595 Historical Topics in Mathematics for Middle School Teachers, 3 credits - change course description; change credit hours to 4; change online hours; change prereqs

E.1.b.8

- MTH 496/596 Concepts of Calculus for Middle School Teachers, 3 credits - change course description; change credit hours to 4; change online hours; change prereqs

E.1.b.9

- MTH 497/597 Mathematics in the Middle School Classroom, 3 credits - change course description; change credit hours to 4; change online hours

College of the Arts

New Courses

E.1.b.10

- MUS 490/590 Fundamentals of Acting for Singers, 3 credits
Acting training tailored to singers pursuing careers in performance. Methods are Stanislavski-based, combined with Meisner techniques, and Reichean breath work. The class will involve some lecture, but will primarily focus on storytelling, character development, and other performance techniques taught in an experiential fashion. Prerequisites: MuP 190 and MuP 290.

March 9, 2017

TO: Faculty Senate

FROM: Robert Sanders
Chair, Undergraduate Curriculum Committee

RE: Consent Agenda

The following proposals have been approved by the Undergraduate Curriculum Committee and are recommended for approval by the Faculty Senate.

You may read the full text for any course or program proposal as well as Faculty Senate Budget Committee comments on new and change-to-existing program proposals by going to the PSU Curriculum Tracking System at <http://psucurriculumtracker.pbworks.com> and looking in the **2016-17 Comprehensive List of Proposals**.

College of the Arts

Changes to Existing Programs

E.1.c.1

- Art Practices, BA/BS – changes title to *Art Practice, BA/BS*; updates foundation/core curriculum; increases major credits from 88 to 89; aligns BA/BS more closely with the revised BFA program. FSBC: no significant budgetary impact.

E.1.c.2

- Art Practices, B.F.A – changes title to *Art Practice, B.F.A.*; increases required credits from 108 to 121; revises first-year foundation/core curriculum. FSBC: Significant budgetary impact.

E.1.c.3

- Music Education, B.M. – adds the submission of Music Education Portfolio to the requirements. FSBC: No significant budgetary impact.

E.1.c.4

- Performance with an Emphasis on Voice, B.M. – adds Acting for Singers to the required courses; removes Orchestration from required courses. No change in major credit requirements. FSBC: A modest budgetary impact.

New Courses

E.1.c. 5

- Art 101 CORE: Surface (5)
Introduction to working with surface as a medium, concept, and process. The principles and elements of design will be explored in relation to the practices of two-dimensional design, typography, and color theory. No prerequisites. Open to non-majors.

E.1.c.6

- Art 102 CORE: Space (5)
Introduction to space as a medium, concept, and process framed by the principles of gravity/weight, compression/expansion, torsion/tension, presence/absence, and process/product. Lectures, readings, demonstrations and hands-on projects help students identify and understand space-based principles in art and design. No prerequisites. Open to non-majors.

E.1.c.7

- Art 103: CORE: Time (5)
Introduction to working with Time as a medium, concept, and process. Within this, the principles of duration, intensity, and rhythm are particularly significant and frame narrative and storytelling development. This course involves lectures, readings, demonstrations and hands-on exercises that help students identify time-based principles in art and design. Individual and group projects support these concepts in practice. No prerequisites. Open to non-majors.

E.1.c.8

- Art 104 CORE: Digital Tools (2)
Focus on digital media as a creative tool for artists and designers. Introduction to various tools and technologies relating to graphics, audio, video, and 3D through demos and lectures. Introduction to a selection artists and designers who work with these tools in practice and industry. Best practices in file management, and workflow will also be discussed. No prerequisites.

E.1.c.9

- Mus 246 SAMP II: Studio Techniques (3)
Foundational study of the concepts and techniques used in commercial music production. This class will introduce multi-track digital audio recording, editing, mixing and signal processing. Topics will include MIDI music making with virtual instrument plug-ins, synthesis and sampling technologies.

Changes to Existing Courses

E.1.c.10

- ArH 491 20th Century Art – change course number to ArH 383; change title to *Western Art in the 20th Century*; change description.

E.1.c. 11

- Art 469 Communications Design Internship – change course number to Art 315; change title to *Professional Development*; change description, prerequisites.

E.1.c.12

- Art 471 Communications Design Seminar – change title to *Design Thesis II*; change description.

E.1.c.13

- Mus 101 Basic Materials of Music – change title to *Contemporary Music Theory I*; change description.

E.1.c.14

- Mus 102 Basic Materials of Music – change title to *Contemporary Music Theory II*; change description.

E.1.c.15

- Mus 103 Basic Materials of Music – change title to *Contemporary Music Theory III*; change description.

E.1.c.16

- Mus 191, 192, 193 Classroom Instruction – change title to *Group Lessons for Beginners*.

College of Liberal Arts and Sciences**Changes to Existing Programs**

E.1.c.17

- Black Studies, BA/BS – changes required courses; adds a methods course and a capstone to major; develops three distinct and one general areas of study. FSBC: No significant budgetary impact.

E.1.c.18

- Black Studies, Minor – simplifies minor; allows students to select from a broader selection of Black Studies courses. FSBC: No significant budgetary impact.

E.1.c.19

- English, BA – adds BS option to major; bolsters foundational skills, emphasizes the structural relationship of minority and global traditions to the study of literature and culture and provides students with the flexibility to design a purposeful path through the English major. FSBC: No significant budgetary impact.

New Courses

E.1.c.20

- CR 313 Environmental Conflict Resolution (4)
Critically examines conflict resolution principles and practices as applied to environmental conflicts. Explores the conflict between the duty to protect the environment against promoting economic well-being for humanity. Examines conflict resolution theory and practice in terms of case studies of environmental conflict, locally, nationally, and globally.

E.1.c.21

- Eng 397 Digital Literary Studies (4)
Introduction to digital literary studies using both theoretical readings and hands-on computational exercises. Explores how networked computers offer new contexts for reading, interpreting, and making literature and literary criticism. Focuses on using databases and archives to study and produce literary texts. No prior computer training is necessary.

E.1.c.22

- Psy 315 Pathways Through Psychology (4)
Combines career considerations with exploration of multiple aspects of psychology as a discipline and their relevance to student futures. Exposure to faculty, graduate students and employers will help ground decisions about employment and graduate school, broadening perspective on what it is to be a knowledgeable, psychologically literate citizen. Prerequisite: Psy 204.

Changes to Existing Courses

E.1.c.23

- Ch 408 Workshop Leader – change description, grading option.

E.1.c.24

- Comm 200 Principles of Communication – changes course number to Comm 300; changes description.

E.1.c.25

- Dane 101, 102, 103 First-Year Danish – drop.

E.1.c.26

- Dane 201, 202, 203 Second-Year Danish – drop.

E.1.c.27

- Geog 356U Russia and Its Neighbors – change description.

E.1.c.28

- Soc 301 Foundations of Sociology I – change title to *Classical Theory*.

E.1.c.29

- SpHr 495 Organic Communication Disorders – change title to *Neurogenic Communication Disorders*; change description, prerequisites.

School of Social Work**Changes to Existing Courses**

E.1.c.30

- CFS 480 Societal Influences on Professional Practice – change course number to CFS 487; change title to *Examining Bias and Belief*.

E.1.c.31

- CFS 481U Family Health Issues – change course number CFS 381; change title to *Families, Stress, and Change*.

E.1.c.32

- CFS 488 Social Justice in CFS – change title to *Structural Oppression*; change prerequisites.

E.1.c.33

- CFS 492 Families and the State: Effects of Legislation and Policies on Children and Family – change title to *Family Law and Policy*.

E.1.c.34

- CFS 494 Professional Development in CFS I – change title to *Professional Self: Critical Thinking*; change credit from 3 to 2; change prerequisites, grading option.

E.1.c.35

- CFS 495 Professional Development in CFS II – change title to *Professional Self: Identity*; change credits from 1 to 2.

E.1.c.36

- CFS 496 Professional Development in CFS III – change title to *Professional Self: Integration*.

College of Urban and Public Affairs**Changes to Existing Programs**

E.1.c.37

- International Studies, BA – revises the major by increasing students' grounding in theoretical concepts related to International Studies; adds an additional core class; adds two thematic foci. FSBC: No significant budgetary impact.

E.1.c.38

- Political Science, BS – adds a methods requirement to the major. FSBC: No significant budgetary impact.

New Courses

E.1.c.39

- Intl 349U Gender and Development (4)
Examines how the material benefits of globalization and development projects are not shared equally across gender(s). Evaluates how development theory and practice address poverty, health, environment, sexuality, population, domestic/paid work. Also examines the emergence of civil society, patterns of violence, and political participation globally. This is the same course as WS 349U and may be taken only once for credit.

E.1.c.40

- Intl 375U Globalization and Forced Migration (4)
Exploration of the relationship between globalization and forced migration, with particular emphasis on contemporary prejudice associated with migrants, and the differential experiences of the displaced around the world.

Attachment E.1.d

University Studies Program

117 Cramer Hall 503-725-5890 tel
Post Office Box 751 503-725-5977 fax
Portland, Oregon 97207-0751 Email: askunst@pdx.edu



March 7, 2017

TO: Faculty Senate

FROM: Joel Bettridge
Chair, University Studies Council

RE: Consent Agenda

The following courses have been approved for inclusion in UNST Clusters by the UNST Council and are recommended for approval by the Faculty Senate.

New Cluster Courses

ANTH 376	The Neandertals	Interpreting the Past
ENG 397	Digital Literary Studies	Design Thinking, Innovation, Entrepreneurship
ESM357	Business Solutions to Environmental Problems	Environmental Sustainability
G 343	Planets in our Solar System and Beyond	Global Environmental Change
INTL 349	Gender and International Development	Gender and Sexualities
INTL 375	Forced Migration and Exploitation	Global Perspectives
SOC 320	Globalization	Global Perspectives
WS 320	Intro to Girls' Studies	Gender and Sexualities
WS 382	Transgender Studies	Gender and Sexualities
WS 367	War, Sexual Violence, and Healing	Gender and Sexualities
WS 367	War, Sexual Violence, and Healing	Global Perspectives

The link to the cluster proposals is: <https://unstcouncil.pbworks.com/w/page/115504837/2017-2018%20Cluster%20Course%20Proposals>

Attachment E.2

The Faculty Senate Steering Committee proposes the following resolution:

Whereas the Educational Policy Committee has found that increasing class size arbitrarily can have a negative impact on educational quality, on students, and on faculty,

be it resolved that the Faculty Senate concurs with the Educational Policy Committee's recommendation that contemplated decisions "to increase class size should include a systematic evaluation of the change beyond budgetary and accreditation concerns"¹, including consideration of retention, student success, effective teaching, and faculty workload.

***Rationale.** EPC, in its role as the Senate committee charged with making recommendations to Senate about educational policies that cut across the curriculum, has found that research shows significant potential impacts of increasing class size on student success and educational quality, as well as on faculty members' work in the classroom. While recognizing that budgetary considerations must play a role, the EPC report urges that these other concerns also be taken into systematic account. Consonant with PSU's Strategic Plan, elevating student success and advancing excellence in teaching should be central to the evaluation.*

¹ Educational Policy Committee memorandum to Faculty Senate, "Impact of Increasing Class Size and Recommendations for a Systematic Assessment Approach," 15 March 2017, Section 4.

Attachment E.3

The Budget Committee and Steering Committee propose the following constitutional amendment:

The Constitution of the Portland State University Faculty, Article IV, Section 4.4.j, is hereby amended by adding the following as item (2) in the list of charges for the Budget Committee and renumbering the subsequent items.

2) Consult with academic leaders of Colleges/Schools, Intensive English Language Program, and University Studies, and make recommendations for the preparations of their annual budgets and enrollment plans. Each Budget Committee member from one of the above listed units shall serve as liaison to his/her unit for this purpose, with other members assigned as liaisons as needed.

Rationale:

- 1. To encode the current practice so that academic leaders see this as a required task for the Budget Committee and can anticipate this interaction.*
- 2. Make potential members of the committee aware of specific liaison duties.*

**POLICIES AND PROCEDURES FOR THE EVALUATION OF FACULTY FOR
TENURE, PROMOTION, AND MERIT INCREASES**

PROPOSED CHANGES, PENDING RATIFICATION BY AAUP, 27 MARCH 2017

Note by the Secretary. This Packet Attachment shows the proposed changes to the P&T Guidelines regarding review of non-tenure-track faculty for continuous appointment, i.e., text added to or deleted from the current version (2014) of the P&T Guidelines.

Highlighted text represents material changed from the version of the NTTF Review Guidelines passed by Faculty Senate on 6 June 2016. Some material has also been rearranged between that version and this one.

Underlined text represents proposed additions to the current P&T Guidelines.

Text in regular font, whether highlighted or not, is carried over from the current P&T Guidelines (including text that has been borrowed from another place in the current document).

Text shown ~~struck through~~ represents proposed deletions from the current P&T Guidelines (or if ~~also highlighted~~ deleted from the version of 6 June 2016).

If the changes below are approved, corresponding changes will also be made to the title page (date and circumstances of revision) and table of contents (new items and revised page numbers) of the P&T Guidelines.

For the full text of the current (2014) P&T Guidelines, see:
https://www.pdx.edu/academic-affairs/sites/www.pdx.edu.academic-affairs/files/PT%20Guidelines%20%205-12-2014_0.pdf

For the version of the changes passed by Senate on 6 June 2016, see:
https://www.pdx.edu/faculty-senate/sites/www.pdx.edu.faculty-senate/files/NTTF_Review_Guidelines_as_Amended.pdf

IV. ACADEMIC APPOINTMENTS

....

C. Definition, Use, and Conditions of Faculty Appointments

Faculty appointments are defined as (a) non-tenure track or (b) tenure track. Non-tenure track appointments are (a) fixed-term appointments, (b) probationary appointments, or (c) continuous appointments. Tenure track appointments are (a) annual tenure appointments or (b) indefinite tenure appointments.

1. Non-Tenure Track Appointments

a. Fixed-term appointments

Circumstances occasionally warrant the hiring of non-tenure track instructional faculty on a fixed-term appointment for a specific and limited period of time.

For example, a fixed-term appointment is appropriate for visiting faculty, to fill a temporary vacancy (such as a vacancy caused by another employee being on

leave or pending a search for a vacant position), when a program is newly established or expanded, when the specific funding for the position is time-limited, or for a specific assignment or to fill a discrete need that is not expected to be ongoing. The letter of offer for a fixed-term instructional faculty appointment shall state the reason that warrants the fixed-term appointment.¹

Fixed term appointments are made for a specified period of time and are not eligible for tenure. Although fixed term appointments do not require timely notice under the provisions of OAR 580-21-305, notices of intent to reappoint or not to reappoint should be sent by April 1 of the first year of a non-tenure track fixed term appointment and by January 1 of subsequent years. Such notices of intent may be based on the availability of funds. Departments are required to provide an annual evaluation of the performance of ~~non-tenure track~~ fixed term faculty after the first year consistent with the practices specified in their promotion and tenure guidelines. It should be understood that non-tenure track fixed term appointments are for specified times and no reason for a decision not to reappoint need be given.

In the event that the University intends to extend a fixed-term appointment beyond three years of continuous service, the University will provide notice to the Association at least 60 days in advance of the extension.² This notice shall provide a rationale for the position remaining a fixed-term appointment.

In the event that a fixed-term instructional faculty member is to be appointed to a position eligible for a continuous appointment, the University will notify the Association and the parties agree to discuss, as necessary, the appropriate probationary period and whether any time served as a fixed-term faculty member is to be credited to the probationary period.³

~~b. Use of non-tenure track appointments~~

~~i. Upon the adoption of these guidelines the use of non-tenure track appointments for continuing faculty who are .50 FTE or more on instructional accounts and who hold professorial rank shall be reduced as much as possible, consistent with stable funding and the special needs of academic units.~~

~~ii. Non-tenure track positions should be used for positions established with non-recurring funds that are defined as temporary. Appointments such as a visiting professor or a sabbatical leave replacement are considered temporary.~~

~~c. Conditions for non-tenure track appointments~~

~~i. Initial appointments shall be for an appropriate fixed term period, but typically one or two years. Initial appointments may be granted at the~~

¹ 2016-2019 CBA, Sec. 3.

² 2016-2019 CBA, Sec. 3.

³ 2016-2019 CBA, Sec. 3.

~~discretion of the Provost or appropriate Vice Provost.~~

~~ii. After six years of cumulative full time service, individuals who hold non-ranked appointments in academic support, administrative support, and student support units on multi-year, fixed term appointments shall be eligible to be considered for administrative leave for professional development. Such leave is at the discretion of the Provost or appropriate vice president consistent with State System guidelines.~~

b. Probationary appointments

Non-tenure track instructional faculty members with a probationary appointment will be employed on annual contracts during the first six (6) years of employment as non-tenure track instructional faculty members. Annual contracts during the probationary period will automatically renew unless timely notice is provided. Notice of non-renewal of an annual contract during the probationary period must be provided by April 1 of the first year of the probationary period and by January 1 of the second through fifth years of the probationary period, effective at the end of that academic year.⁴ Such notices may be based on the availability of funds. It should be understood that no reason for a decision not to reappoint need be given.

c. Continuous appointments

A continuous appointment is provided to a non-tenure track faculty member who has completed the necessary probationary period in a continuous appointment-eligible position. A continuous appointment is an indefinite appointment that can be terminated only under the following circumstances⁵:

1. Pursuant to Article 22 (Retrenchment).
2. When a sanction of termination is warranted and imposed pursuant to Article 27 (Imposition of Progressive Sanctions).
3. Due to a change in curricular needs or programmatic requirements made in accordance with applicable shared governance procedures. In such a case:
 - i. As soon as practicable, but no later than 60 days prior to issuing a notice of termination, the Department Chair must provide written justification for the decision and explanation of the applicable shared governance procedure to the faculty members, the Dean, the Provost and the Association.
 - ii. If the employment of multiple faculty members in equivalent positions, and with equivalent position-related qualifications, skills and expertise, are to be terminated due to the same change in curricular needs or programmatic requirements, then lay-off shall be in order of seniority. Faculty will be laid off in inverse order of length of continuous service at the University.
 - iii. The faculty member is to be given at least six months' notice of termination of employment, with such termination effective at the end of

⁴ 2016-2019 CBA, Sec. 2b.

⁵ 2016-2019 CBA, Sec. 2 e .

the academic year.

iv. The School/College will make a good faith effort to find a comparable position within the University for the faculty member.

v. If the reason for the decision that led to the layoff is reversed within three years from the date that notice of termination was provided to the faculty member, the affected faculty members will be recalled in inverse order of layoff. To exercise recall rights, a faculty member must:

1. Notify Human Resources in writing, within 30 days of the termination notice, of intent to be placed on the recall list. If/when there is a need for a recall list, the University and the Association will meet promptly for the purpose of negotiating a process for administering the recall list.

2. Inform Human Resources of any change in telephone, email or address.

3. In the event of a recall, Human Resources will contact the faculty member by phone and email, and notify the Association, of the recall.

4. The recalled faculty member will have ten (10) working days to accept or reject the position. Failure to contact Human Resources within ten (10) working days will be considered a rejection of the position.

5. A recalled faculty member who rejects a position will be removed from the recall list.

4. If the faculty member receives an unsatisfactory evaluation and fails to remediate the deficiencies during the subsequent academic year.

d. A non-tenure track appointment does not foreclose the possibility that a department may wish to consider that faculty member for a tenure-related appointment. In such cases, the years spent under a non-tenure track appointment may be considered as a part of the probationary period for tenure at the time the individual is placed on the annual-tenure track. A mutually acceptable written agreement shall be arrived at between the faculty member and institutional representative as to the extent to which any prior experience of the faculty member shall be credited as part of the probationary period, up to a maximum of three years.

....

V. ADMINISTRATIVE ROLES AND PROCEDURES/PROMOTION AND TENURE

....

NON-TENURE TRACK INSTRUCTIONAL POSITIONS – PROMOTION

....

NON-TENURE TRACK INSTRUCTIONAL POSITIONS – CONTINUOUS APPOINTMENT-RELATED EVALUATIONS

This section describes the process through which eligible non-tenure track (NTT) instructional faculty may be considered for continuous appointment, and are evaluated and may be considered for continuous employment. This document covers NTTF hired after September 16, 2016. For NTT instructional faculty hired prior to this date, see also the Implementation Plan.

A. Departmental Authority and Responsibility

The department as a whole shall establish its general guidelines, including the criteria to be used for evaluation of faculty for continuous appointment, prior to continuous appointment and after continuous appointment, and shall ensure that these guidelines fulfill the minimum standards of the University guidelines, which have priority. The responsibility for evaluating and documenting an individual faculty member's performance rests primarily with the department. The procedures and criteria to be used for evaluation of faculty for continuous appointment, to include the evaluations before and after continuous appointment, must be consistent with university and college or school policy, approved by the Dean and Provost, and must be formulated early enough to allow maximum time for making decisions.

Approval of departmental procedures and criteria by the Dean and Provost is required. If a Dean disapproves newly revised departmental criteria, then he/she will submit both departmental recommendations and his/her objections or amendments to the Provost for resolution.

After approval by the Provost, the guidelines must be distributed to all members of the department faculty and to the academic Dean. Department chairs should distribute these guidelines to new non-tenure track faculty upon their arrival at Portland State University.

The guidelines must be in writing and be distributed to all members of the department faculty. Guidelines should be clear and unambiguous and include a calendar for a cycle of reviews. Department chairs must distribute these guidelines to new non-tenure track faculty with their appointment letter.

B. Initial Appointment

Initial appointments of NTT instructional faculty are not the responsibility of a sole administrator. Where possible, a committee of at least three faculty including at least one NTT instructional faculty shall seek qualified applicants and forward a recommendation to the chair.⁶

C. Type of Appointment

Initial appointment of NTT instructional faculty may be either probationary or fixed term. In making an appointment of a non-tenure track instructional faculty member, the appointing unit must specify whether the appointment is probationary or fixed term. ~~Instructional faculty under a fixed term contract are not eligible for consideration for continuous employment.~~

D. Faculty Offer and Position Descriptions⁷

The University will provide template letters of offer for non-tenure track instructional appointments. For non-tenure track instructional appointments, 1.00 FTE will include no more than 36 course credits of assigned teaching per academic year. Assigned university / community / professional service and scholarly work shall not exceed ten percent (10%) of

⁶ 2016-2019 Collective Bargaining Agreement, ARTICLE 18, henceforth referred to as "2016-2019 CBA."

⁷ 2016-2019 CBA, Sec. 4.

an instructional non-tenure track faculty member's workload without a reduction in instructional load.

The template letter of offer will include a position description. Taken together, a letter of offer and position description for non-tenure track instructional appointments will include the following information: whether the appointment is eligible for continuous appointment or fixed-term, appointment start date, appointment end date (for fixed-term appointments only), the reason warranting the fixed-term appointment (for fixed-term appointments only), FTE, annual salary rate, actual salary, teaching assignment (including, where possible, the list of courses to be taught and the location of those courses if not on the downtown University campus), whether the appointment is renewable, and any expectations for research and scholarly work, university service, professional service, or other responsibilities. Bargaining unit members shall have an opportunity to review the letter of offer and position description and will affirm their acceptance of the offer of employment by signing and returning to the University a copy of both the letter of offer and the position description.

The University will direct departments to complete letters of offer and position descriptions at least 30 days prior to the start of work for the initial term of employment of any non-tenure track instructional faculty member so that employment documents are forwarded to the Office of Human Resources according to the published payroll deadline schedule.

E. Annual Review

NTT instructional faculty members are to be evaluated annually through a developmental review process during years one through five of the probationary period.⁸ The review should document and evaluate faculty contributions, and provide developmental feedback and guidance in preparation for the Milestone Review for Continuous Appointment. This review should be consistent with the faculty member's letter of appointment.

Prior to the implementation of this annual review process, each department/academic unit shall establish and maintain guidelines for review of NTT instructional faculty members that are consistent with the guidelines developed by the Faculty Senate. Nothing in this provision affects or alters the Association's ability to file a grievance, as provided in Article 28, that alleges a violation of such guidelines.⁹ In the event that an NTT instructional faculty member has had annual contracts with more than one unit during the probationary period, the department chairs or equivalents and the employee will mutually decide which unit will be responsible for the evaluation. In the event that a mutual decision cannot be made, the Dean or designee of the relevant college, or Provost or designee in the case of multiple colleges, will make a determination.

The departmental guidelines must, at a minimum:¹⁰

- Be in writing and be made available to members;

⁸ 2016-2019 CBA, Sec. 2 c.

⁹ 2016-2019 CBA, Sec. 6 a.

¹⁰ 2016-2019 CBA, Sec. 6 b.

- Require each department to identify the committee(s) responsible for the evaluations;
- Establish job-relevant evaluation criteria and require the criteria to be in writing;
- Provide that the results of the review be in writing and provided to the member;
- Provide that the member is entitled to meet with the reviewers;
- Provide that the member is able to respond to the review by submitting a statement or comments, which shall be attached to the review;
- Provide that the member may submit relevant materials to the reviewers;
- Provide that the member may request a review if one has not been provided within the time period provided for by the guidelines;
- Provide that the member is to have reasonable notice of the evaluation;
- In a department with more than one NTT instructional faculty member, provide that at least one NTT instructional faculty member will be on the review committee; and
- In the event a department has only one NTT instructional faculty who is being reviewed, the department will add an NTT instructional faculty member from another unit in the school or college, or another school or college if necessary.

The departmental guidelines must provide that Annual Review Submission Materials submitted by the faculty member should, at a minimum, include the following:

- An annual self-appraisal that reflects the areas of work as described in the NTT instructional faculty member's job description and that highlights activities and achievement;
- Current curriculum vitae following applicable sections of the PSU Promotion and Tenure format approved by the Provost;
- Appropriate and relevant quantitative and/or qualitative summaries of student evaluations as defined for this purpose by the department (i.e., mean and standard deviation, or median and interquartile range), or appropriate assessments of teaching since the last review;
- Syllabi and/or other pedagogical materials from the review period.

The departmental guidelines must provide that Annual Review Submission Materials submitted by the faculty member may include, but are not limited to:

- Peer evaluation of teaching and curricular innovation;
- Description of professional development activities intended to advance job performance;
- A reflective analysis of student and/or peer evaluations of teaching;
- Evidence of scholarly activities, beyond the classroom, as defined by the discipline;
- Evidence of ability to work effectively with individuals from and topics related to diverse populations;
- Evidence of service activities related to unit mission.

F. Timing for Continuous Employment Consideration and Appointment¹¹

In year 6 of the probationary period, NTT instructional faculty members are to be evaluated for continuous appointment through a Milestone Review. Prior to the end of the

¹¹ 2016-2019 CBA, Section 2 d.

final academic year of the probationary period, a NTT instructional faculty member is to be awarded a continuous appointment or provided twelve (12) months' notice of termination of employment.

G. Milestone Review for Continuous Employment

Milestone reviews provide a way to honor and reward a sustained record of commitment and achievement. A milestone review that looks both backward and forward is appropriate when considering the award of a continuous appointment. When the review is clear and consistent, it supports academic freedom and contributes to academic quality.¹²

Each department/academic unit shall establish and maintain guidelines for Milestone Review for Continuous Appointment of NTT instructional faculty members that are consistent with the guidelines developed by the Faculty Senate. Nothing in this provision affects or alters the Association's ability to file a grievance, as provided in Article 28, which alleges a violation of such guidelines.¹³

The departmental guidelines must, at a minimum:¹⁴

- Be in writing and be made available to members;
- Require each department to identify the committee(s) responsible for the evaluations;
- Establish job-relevant evaluation criteria and require the criteria to be in writing;
- Provide that the results of the review be in writing and provided to the member;
- Provide that the member is entitled to meet with the reviewers;
- Provide that the member is able to respond to the review by submitting a statement or comments, which shall be attached to the review;
- Provide that the member may submit relevant materials to the reviewers;
- Provide that the member may request a review if one has not been provided within the time period provided for by the guidelines;
- Provide that the member is to have reasonable notice of the evaluation;
- In a department with more than one NTT instructional faculty member, provide that at least one NTT instructional faculty member will be on the review committee; and
- In the event a department has only one NTT instructional faculty who is being reviewed, the department will add an NTT instructional faculty member from another unit in the school or college.

A significant factor in determining an NTT instructional faculty member's performance is the individual's accomplishments in teaching, mentoring, and curricular activities, consistent with the faculty member's contractual responsibilities. Teaching activities are scholarly functions that directly serve learners within or outside the university. Scholars who teach must be intellectually engaged and must demonstrate mastery of the knowledge in their field(s). The ability to lecture and lead discussions, to create a variety of learning opportunities, to draw out students and arouse curiosity in beginners, to stimulate advanced students to engage in creative work, to organize logically, to evaluate critically the

¹² Letter of Agreement, Nov. 5, 2015.

¹³ 2016-2019 CBA, Section 6 a.

¹⁴ 2016-2019 CBA, Section 6 b.

materials related to one's field of specialization, to assess student performance, and to excite students to extend learning beyond a particular course and understand its contribution to a body of knowledge are all recognized as essential to excellence in teaching. Teaching scholars often study pedagogical methods that improve student learning.¹⁵

The Milestone Review of teaching and curricular contributions should not be limited to classroom activities. It also should focus on a faculty member's contributions to larger curricular goals (for example, the role of a course in laying foundations for other courses and its contribution to majors, or contributions to broad aspects of general education or interdisciplinary components of the curriculum).¹⁶ In addition, the Milestone Review should take into account any documentation of student mentoring, academic advising, thesis advising, and dissertation advising. The Review Committee shall take into account any variations in the letters of appointment during the probationary period.

The departmental guidelines must provide that the Milestone Review Submission Materials submitted by the faculty member should, at minimum, include the following:

- A cumulative annual self-appraisal that reflects the areas of work as described in the NTT instructional faculty member's job description and highlights activities and achievement;
- Current curriculum vitae following applicable sections of the PSU Promotion and Tenure format approved by the Provost;
- Appropriate and relevant quantitative and/or qualitative summaries of student evaluations as defined for this purpose by the department (i.e., mean and standard deviation, or median and interquartile range) or appropriate assessments of teaching since the last review;
- Representative syllabi and/or other pedagogical materials from the six-year review period.

The departmental guidelines must provide that the Milestone Review Submission Materials submitted by the faculty member may include, but are not limited to:

- Peer evaluation of teaching and curricular innovation;
- Description of professional development activities intended to advance job performance;
- A reflective analysis of student and/or peer evaluations of teaching;
- Evidence of ability to work effectively with individuals from and topics related to diverse populations;
- Evidence of service activities related to unit mission;
- The annual self-appraisals prepared by the faculty member.

Departmental guidelines must provide that the following additional items may be included also considered in the evaluation of teaching and curricular accomplishments, to the extent

¹⁵ Policies and Procedures for the Evaluation of Faculty for Tenure, Promotion, and Merit Increases, 2014 (henceforth 2014 P&T Guidelines) Sec. E 3.

¹⁶ 2014 P&T Guidelines, Sec. E 3.

consistent with a faculty member's letter of appointment:

- Contributions to courses or curriculum development;
- Materials developed for use in courses;
- Results of creative approaches to teaching methods and techniques, including the development of software and other technologies that advance student learning;
- Results of assessments of student learning;
- Accessibility to students;
- Ability to relate to a wide variety of students for purposes of advising;
- Mentoring and guiding students toward the achievement of curricular goals;
- Results of supervision of student research or other creative activities including theses and field advising;
- Results of supervision of service learning experiences in the community;
- Contributions to, and participation in, the achievement of departmental goals, such as achieving reasonable retention of students;
- Contributions to the development and delivery of collaborative, interdisciplinary, University Studies, and inter-institutional educational programs;
- Teaching and mentoring students and others in how to obtain access to information resources so as to further student, faculty, and community research and learning;
- Grant proposals and grants for the development of curriculum or teaching methods and techniques;
- Professional development as related to instruction, e.g., attendance at professional meetings related to a faculty member's areas of instructional expertise;
- Honors and awards for teaching.¹⁷

H. Procedures for Milestone Review

1. Notification

The department chair notifies the chair of the appropriate departmental committee of those non-tenure track faculty who are eligible for review.

2. Departmental Promotion and Tenure Committee Establishment and Authority

All recommendations for continuous appointment originate with formally established departmental committees; for example, an elected advisory committee, or an elected committee on promotion and tenure. The department as a whole shall determine the composition of the committee and the method of selection of its members and chairperson. When a faculty member has been involved in interdisciplinary teaching and/or research, the committee will include a faculty representative from a mutually agreed upon second department or program. Since the department chair is required to make a separate evaluation of the department faculty, the chair cannot be a member of the committee. The committee may invite other faculty members to participate in its deliberations. This committee acts as an independent reviewer of the performance of department faculty and initiates recommendations for all department faculty except the department chair. Committee members being considered for continuous appointment

¹⁷ 2014 P&T Guidelines, Sec. II.E.3.

shall not participate in the committee review of their cases.

3. Committee Decision and Narrative Report

The Committee's report to the department chair will be in the form of a written narrative for each affected faculty member. The report must address and review all areas of the dossier submitted by the faculty member in application for continuous appointment. The departmental committee must make one of two recommendations for each member of the department and the votes of each voting member of the committee must be recorded on the recommendation form.

a. Denial: This decision is appropriate for faculty whose requests for continuous appointment are not accepted. Denials of continuous appointment must be accompanied by a written report.

b. Approval: This decision is appropriate for faculty whose attainments warrant continuous appointment. Where a positive recommendation is being made, a written report following the format in Appendix III must accompany the recommendation form.

4. Responsibilities of Department Chair

The department chair must be satisfied that the departmental committee has followed the departmental guidelines and that the appraisals are complete and in proper form. Department chairs are to make a separate recommendation for each faculty member under review and take the following actions:

a. confirm that all eligible faculty have been considered

b. review positive and negative recommendations and the supporting materials of the faculty member in question. The chairs will make a separate recommendation, adding their own written narrative to the committee's. The Chair's narrative must address and review all areas of the dossier submitted by the faculty member. If the recommendation of the chair differs significantly from the committee's recommendation, the chair shall state in writing the reason for the specific differences.

The department chair informs each faculty member in a timely manner in writing of the departmental committee's and of his/her own recommendations. The faculty members should be given the opportunity to review their files before they are forwarded to the Dean and should indicate they have done so by signing the "Appraisal Signature and Recommendation Form". A copy of the complete appraisal and any additional material added by the department chair should be in the file for review by the affected faculty member. The department chair must discuss with a faculty member, when requested, the reasons for the recommendations by the departmental committee and the department chair. If a department member questions either departmental recommendation, he/she may request a reconsideration of that recommendation.

5. Procedures for Reconsideration of Department Decision

Within two weeks of receipt of written notice of department action, the faculty member must give written notice of intent to request a reconsideration of the recommendation.

If the request is for reconsideration of the departmental committee recommendation, both the committee chair and the department chair must be notified and the department chair must return all appraisal materials promptly to the committee chair. Otherwise, only the department chair need be notified in writing.

The review may be requested on the basis of procedural or substantive issues. The faculty member should prepare whatever supportive material is pertinent. The supportive materials must be submitted to the committee chair, or department chair, as appropriate, within two weeks of written notification of intention to request the reconsideration.

All materials submitted by a faculty member shall become part of the appraisal document. The departmental committee and/or department chair, as appropriate, shall consider the materials presented by the faculty member. The committee chair and/or department chair may attach to the appraisal additional documentation or statements with their recommendation(s). The department chair shall forward the appraisal, which shall then proceed through the normal administrative review procedure in a timely manner.

6. Chair's Report to the Dean

The department chair must submit the following to the Dean:

- a. statement of assurance that all eligible non-tenure track faculty have been reviewed;
- b. recommendation form for each faculty member; and,
- c. the committee's and the chair's written narratives for all faculty members who have received positive or negative recommendation for continuous appointment.
- d. if requests for reconsideration are made, all materials submitted with the request for reconsideration and the committee's and/or the department chairs response after reconsideration.

Upon receipt of the Dean's decision, the chair must inform the faculty member of that recommendation in a timely manner.

7. Responsibilities of the Dean or Equivalent Administrator

The Dean shall use an advisory group for review and evaluation of the recommendations from the department chairs and departmental committees. The size and composition of this group shall be at the discretion of the Dean. The Dean is responsible for making the decision to approve or deny continuous appointment.

All actions taken by the Dean must be reported in a timely manner to the appropriate department chair and chairperson of the appropriate promotion and tenure committee. If the department chair or the chairperson of the promotion and tenure committee requests a conference with the Dean within five days of being notified by the Dean, a conference shall be held before the Dean makes a decision. If the Dean's decision differs from the recommendation of either the departmental committee or department chair, the Dean must notify the affected faculty member in writing of the decision and state the reason for the specific difference. The affected faculty member may seek a

meeting with the Dean prior to the finalization of any decision that differs with the recommendation of the departmental committee. The Dean shall provide the affected faculty member with a copy of any material added to the file. The affected faculty member may attach a statement in response to the action of the Dean.

8. Appeals to the Provost

A faculty member may appeal an adverse decision by the Dean to the Provost by submitting an appeal within ten working days of notice of the Dean's decision. The faculty member's appeal must state the basis for the appeal. The faculty member may request a conference with the Provost as part of the appeal process. If a conference is requested, the Provost is to meet with the faculty member before deciding the appeal.

The Provost is to provide a final decision on the appeal in writing to the faculty member and Dean.

I. Evaluation Following Continuous Appointment

Non-tenure track instructional faculty on a continuous appointment are to be evaluated after three years of continuous appointment and then after every three years following the last evaluation or promotion¹⁸

The departmental guidelines must provide that the materials submitted by a faculty member for evaluation following continuous appointment should, at minimum, include the following:

- A cumulative ~~annual~~ self-appraisal that reflects the areas of work as described in the NTT instructional faculty member's job description and highlights activities and achievement;
- Current curriculum vitae following applicable sections of the PSU Promotion and Tenure format approved by the Provost;
- Appropriate and relevant quantitative and/or qualitative summaries of student evaluations as defined for this purpose by the department (i.e., mean and standard deviation, or median and interquartile range), or appropriate assessments of teaching since the last review;
- Representative syllabi and/or other pedagogical materials from the review period.

The departmental guidelines must provide that materials submitted by a faculty member for evaluation following continuous appointment may include, but are not limited to:

- Peer evaluation of teaching and curricular innovation;
- Description of professional development activities intended to advance job performance;
- A reflective analysis of student and/or peer evaluations of teaching;
- Evidence of ability to work effectively with individuals from and topics related to diverse populations;
- Evidence of service activities related to unit mission.

In the event of an unsatisfactory evaluation, the faculty member and department chair or

¹⁸ 2016-2019 CBA, Sec. 2 f.

chair equivalent will meet to discuss the deficiencies identified in the review. Following the meeting, the chair will develop a remediation plan to address the deficiencies. If the faculty member disagrees with the remediation plan, the faculty member may appeal to the dean or the dean's designee, who shall review the plan and make the final decision regarding the contents of the plan. The remediation plan is to be developed before the end of the academic year in which the unsatisfactory evaluation occurred. If the chair and faculty member identify resources that would assist with the remediation plan, a request for access to such resources will be made to and considered by the Dean. Resource unavailability could result in modification or extension of the remediation plan.¹⁹

Progress on the remediation plan is to be assessed and communicated on a regular basis during the subsequent academic year. At a minimum, the chair and the faculty member will meet near the beginning of the fall term to review the remediation plan and near the end of the fall term to review the faculty member's progress on the remediation plan. Prior to the end of fall term, the chair is to provide the faculty member with a written assessment of progress on the remediation plan, including identification of any issues that have not yet been successfully remediated.

At any point in the process, the chair can determine that the remediation plan has been successfully completed, at which time the chair shall notify the faculty member and conclude the remediation process.

Around the end of the winter term of the academic year following the unsatisfactory evaluation, the chair is to notify the faculty member whether the remediation plan has been successfully completed. If the plan has not been successfully completed, the chair may either extend the plan for an additional academic term or provide the faculty member with notice of termination. A remediation plan may be extended by the chair for up to three academic terms. A notice of termination provided under this section shall be provided to the member, Dean, Provost, and the Association and shall be effective no sooner than the end of the subsequent academic term.

....

¹⁹ 2016-2019 CBA, Sec. 2 g (also including following three paragraphs).

Attachment G.3.a

TO: Brian Sandlin
FROM: Educational Policy Committee
RE: Academic Program Review Guidelines Suggestions
DATE: 2/14/17

The Educational Policy Committee (EPC) formed a subcommittee to examine the Academic Program Review Guidelines in light of educational policy, and we have several suggestions that you might consider while revising them. The primary concern we have is that the terms diversity, underserved, and underrepresented are used without a clear definition and sometimes interchangeably, yet they refer to different people. We would also like to see consistent reporting on the numbers/ratios of tenure-line, NTTF, and contingent faculty.

We note that the Northwest Commission on Colleges and Universities (NWCCU) does not provide any definitions to help us define diversity, Inclusion, and the like.

In Section II, a point not addressed is the ratio of contingency/adjunct faculty to tenure-track faculty.

- We suggest that the ratio of contingency/adjunct faculty to tenure track faculty, particularly when tenure track faculty is/are faculty of record, be reported.
- We suggest addressing diversity for all faculty.
- We also suggest addressing the underrepresentation of certain faculty groups.

In Section IV, we noted that definitions for “diverse” students and faculty are lacking.

- Diversity is used synonymously with underrepresented and underserved students and we expect that this is discipline-specific.
- While the two definitions may converge with some of the same groups fitting into both categories, the terms underrepresented and underserved have two different meanings.
- We suggest addressing graduate student advising in this section as well. While it is the tenure track faculty as the faculty of record who should be primary to advise students, in some cases the adjunct faculty (or non-tenure track faculty) are the ones who actually carry out this responsibility.

In Section VIII, Parts B and C, we are concerned about the ratio of contingency/adjunct faculty who are largely the faculty who deliver the instruction of courses yet tenure track faculty are faculty of record (Same concern as in Section II).

We suggest incorporating the graduate assessment guidelines within the general guidelines.

We recommend training for APR.

Thank you for your consideration.

Attachment G.3.b

To: Faculty Senate
From: Educational Policy Committee
Date: March 15, 2017
Subject: Impact of Increasing Class Size and Recommendations for a Systematic Assessment Approach

The goal of the EPC Sub-Committee (SC) on Class Sizing is to provide perspective, insight and recommendations on the impact of increasing class sizes on education quality, on students, and on faculty. It is hoped that this report will be used in setting policy for how and when increasing class sizes is appropriate.

Section 1 of this report provides an introduction to the class size issue. Section 2 provides a brief review of literature on class size increases and their impact on education quality, on students and on faculty. Section 3 provides a method for systematically assessing the impact of changes in class size on educational quality, learning outcomes, university performance metrics and other salient factors. When considering changing class sizes, factors beyond budget that assess the impact on educational quality, on student success and faculty workload should be considered. We suggest one approach or something similar be used by faculty and administrators when discussing increasing enrollments for a specific course. We conclude with overall recommendations about changing class sizes in section 4.

Section 1: Introduction

Class size has a great impact on education quality [1 through 8]. Larger class sizes are less personal and provide less opportunity for student-faculty interaction which is a key to learning and is an important factor that drives student retention. In particular, it is this individual attention that means the most to diverse students [2, 5]. Moreover, increasing class sizes can force changes to the design of course activities and assignments which effect course learning goals and outcomes. Increasing class size can also significantly increase faculty workload. A number of PSU's programs advertise their smaller class sizes as a reason for students to attend PSU¹. Hence, smaller class sizes also contribute to PSU's reputation and competitive advantage.

At the same time, larger class sizes are more cost effective and profitable for the University. When budgets are tight, this can be an important tool at the University's disposal to avoid cuts in other places that could hurt more. At times, increasing class sizes can enable students to get into a class that they otherwise would have had to wait another term or even year to attend. For some units, their accreditation can be affected by their balance of research active to non-research active faculty and increased class sizes can tip the balance in their favor.

The PSU Administration has sought to increase class sizes at various times, in various programs. The subject matter of the class, the method of teaching, the learning activities that make up the class and

¹ From the Portland State School of Business Administration Web Site as of February 28, 2017, "With more than 3,500 business students, our average class size is 36 students. Business classes are capped at 45 students."

Attachment G.3.b

class design, the number and types of assignments, the level (graduate or undergraduate) and other factors all affect whether a particular class can be increased while maintaining educational quality.

This report seeks to bring into focus the impact of increasing class sizes on educational quality as well as the impacts on student success and on faculty workload. It seeks to provide a systematic approach that faculty and administrators can use to discuss issues associated with increasing class sizes beyond the budgets to enable everyone to have a broader view of the impacts. Finally, this report provides recommendations about increasing class sizes overall.

Everyone recognizes that one size does not fit all when it comes to class sizing. This report seeks to offer a balanced approach.

It should be noted that while this report was crafted with a specific focus (assessing the impact of class size increases to existing courses), we believe that the systematic approach proposed in this document may be applied more broadly and could be used by faculty to optimally size new or existing classes. The approach could also be used to assess the impacts of converting face-to-face courses to online/hybrid or vice versa.

Section 2 – Literature Review

The Class Sizing Sub-Committee looked into the literature to understand the impacts of increasing class size on educational quality, student concerns and experience and faculty concerns [1-8]. The results are clear: students in higher education perform better and achieve superior long term outcomes in classes with smaller class sizes. On occasion, students reported high satisfaction (and higher grades) in certain high number classes that were taught by staff deemed by the students to be “easier.” However, long-term educational outcomes were lower for those students than for students reporting somewhat lower satisfaction with “harder” professors. In other words, “dumbing it down” is not a satisfactory professorial strategy, although student evaluations are superior. The relationship between class size and student outcomes is somewhat more tenuous in primary and secondary education settings (not generally listed in this report). In these settings, more experienced and less experienced teachers generally obtained approximately the same educational outcomes in high class size situations. Conversely, in low class size situations, experienced teachers outperformed inexperienced teachers. However, we stress that the relationship between small and large class sizes appears to be a real phenomenon in a higher education setting.

An annotated bibliography showing the abstracts and references from the literature is contained in appendix B.

Section 3 – An Approach for Assessing the Impact of Changing Class Sizes

Will increasing the size of a class impact educational quality for a particular course? What factors should be considered when assessing the impact?

To determine this, the Educational Policy Committee held focus groups of faculty to identify the factors that should be evaluated and to pilot an approach. It is the strong belief of those in the focus groups

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and on the EPC that factors beyond budget considerations must be assessed prior to deciding to increase class size. To support a balanced discussion about increasing class sizes, we have created the *Course Sizing Assessment* which is contained in Appendix A. It takes into consideration a variety of factors and asks the faculty member to assess the impacts to these factors. The remainder of Section 3 walks through the sections of the *Course Sizing Assessment* and describes its use. The assessment is intended to be used at the individual course level for any class whose enrollment limits are changed.

3.1 Basic Information about the Class

Items 1 and 2 in the *Class Sizing Assessment* (as shown in Appendix A) gather basic information about the class and the proposed change to class size.

- Item 1 - Course number, title, and short course description. If any special goals for the class or unique materials are involved, those should be identified as well.
- Item 2 - The level of the class (lower division, upper division, graduate, graduate certificate, etc.) and the intended audience. Is this course intended for graduating seniors?

3.2 Educational Delivery Mode and Class Types

The educational delivery mode and type of class being taught are significant factors in assessing the suitability of increasing the class size. In Item 3, faculty are asked to specify the type of class being taught. The following is a non-exhaustive list of class types found on the PSU campus.

Table 1 - Class Types
Face-to-Face (F2F) Lecture & Speakers
F2F Lecture with Active Learning (including performing arts practice)
Lecture and Recitation
Lecture and Lab
Hybrid Classes meeting once per week
Hybrid Classes with some other format
Fully Online classes of any type
Community-based Learning
Lab Classes
Community-based Learning & Project learning
Course-based UG Research Experience

3.3 Proposed Change to Course Size

Item 4 documents the proposed change in class size under discussion. Faculty should identify the current class size and the proposed change. In addition to the change in enrollment any other aspect of the proposal should be documented in this section. Will there be any additional instructional support offered to mitigate changes in faculty workload or any other resources provided or change in compensation?

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3.4 Class Components/Activity Definitions and Impact

Regardless of how the class is delivered, classes are made up of a number of different activities or components and a variety of assignments are given during the course of a term. Different types of classes will likely have different activities/components. The *Class Sizing Assessment* seeks to understand and document how well different activities or components of a class will scale with class size increases. Some activities may be easy to scale, such as a lecture. Others, may be difficult to scale in their current form given the resources available.

For example, consider the activity of having students give individual presentations in class. The faculty member who has been asked to increase their class size should identify all of the different educational activities that make up their class in Item 5. In item 5A, they should then discuss how these activities would be impacted by the proposed class size change listed in Item 4.

A non-exhaustive list of class components and activities for different modes of delivery (online, hybrid, and face-to-face) is provided below. The activities using one delivery mode may be different than those for another - even for the same course number.

Table 2 - Class Components
Lecture
Class Discussion: Groups of Students with Professor
Class Discussion Groups of Students among themselves
Active Learning Exercises
Student Presentations
Computer or other lab activities
Individual help with class assignments/activities
Outside Speakers
Video presentations
Performing arts skill training and development
Community-based learning (Team Project)
Community-based learning (external placement individual Internship 404)
Reading and conference activity within a class
Team building exercises
Integrative learning (in class cases)
Course based internships (few hours)
Interpersonal Communication skill development

3.5 Assignment Definitions

The type and number of assignments have a direct bearing on the educational quality of the class. Table 3 contains a list of assignment types. The list is inclusive. Not all classes will incorporate all types of assignments. Which assignment type is critical to achieving the learning goals for the course?

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In Item 6 faculty are asked to list all of the relevant assignments in the class and in Item 6A they should discuss the impacts changing class size will have on these assignments. How well this type of assignment will scale under the proposed change listed in Item 4? What will be the impact to educational quality and student performance if this assignment needs to be redesigned (to be easier to grade) or be eliminated (because there is no time in class given the proposed size increase)?

Table 3 - Assignment Types
Essay Exams
Writing Assignments Term Paper
Writing Assignments Case Report
Writing Assignments Other
Presentations by students individually
Presentations by student teams
Multiple choice exams
Individual projects
Team projects
Graded Individual homework assignments
Video Assignments
Short answer exams
Lab reports
Programming assignments
Essays
Demonstration of technical skills
Participation
Providing feedback on course discussion/ various student work
Demonstration of leadership skills
Demonstration of ability to work with others
Demonstration of ability to organize
Performance based assignments (singing, acting, dance, etc.)

3.6 Impact Definitions

Once the basic course information, the change proposal and the inventory of the class activities and assignments is complete, it's time to look at impacts along key dimensions. When defining impact, we seek to identify metrics that will be meaningful to all stakeholders – students, faculty and administrators and reflect educational quality, student success, and faculty concerns. While these will be defined differently for different courses, programs and units, the following impacts seem broadly applicable, important and useful.

- (a) Impact on Course Learning Goals – Each course has learning goals it seeks to achieve. Item 7 lists these course learning goals/objectives. Item 7A answers the question: How are course learning goals/objectives affected by increasing class size? Also special learning goals that may not be listed on the syllabus should be included. For example, is this course intended to be an integrative capstone learning experience?

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- (b) Impact on Program Assessment Metrics – Many programs have specified learning goals that are assessed as part of their university or school level accreditation. These programmatic learning goals are mapped to specific courses in the program. Item 8 lists the specific programmatic learning goals/objectives assigned to the class. Item 8A answers the question: How are these programmatic learning goals impacted by increasing class size?
- (c) Impact on Graduation, Retention and Placement Rates – Graduation and retention rates are important metrics at PSU. Placement is also of great concern to PSU and in particular to professional schools. Item 9 lists the university level metrics supported by this course. Item 9A answers the question: What is the impact of increasing class size on retention, graduation, and placement rates?
- (d) Impact on Students – Item 10 answers the question: What is the impact on student skills or experience beyond those specifically listed as part of the learning objectives that are relevant? For example while improving writing and presentation skills may not be specific skills identified as learning outcomes for a quantitative course, they are important and may be reduced if increasing class sizes precludes assigning individual papers or giving presentations. Other examples of student impacts may include: developing student technical, problem solving, decision making, or other hands on skills, etc. Also, given the socio-economic diversity of PSU students, what is the impact on students from disadvantaged backgrounds?
- (e) Impact on Faculty Workload – Item 11 answers the question: How much does faculty workload increase when increasing class size? Elements of increased faculty workload due to increasing class sizes include: additional grading, class redesign (to make activities and assignments manageable when increasing class sizes), increased student meetings/office hours, student correspondence, and student advising.²
- (f) Ability to mitigate increased faculty workload with readily available remedies - Item 12 answers the question: When workload increases for faculty based on the numbers of students, can readily available and inexpensive resources be brought to bear to remediate the workload increase?
- (g) Any Other Comments – If there are any other impacts that are salient that were not listed in other sections or other comments, they should be listed in Item 13.
- (h) Impact on Overall Education Quality – Item 14 answers the question: Does the quality of education provided change when increasing class size? Overall, what is your recommendation for the proposed change in Item 4 and why? Be sure to highlight any assignments or class activities that can no longer be conducted due to the class size change and be clear how those will impact educational quality. An example of a significant impact to the educational quality/course learning outcomes of a class would be if in-class student presentations would need to be cut out of a course for graduating seniors in business because they are no longer possible due to the increase in class size.

3.7 Interpretation of the Data Collected by the Assessment

² Faculty should be aware that workload is a mandatory subject of bargaining. If the increase in workload due to increasing class sizes is significant it may be appropriate for the faculty member to contact the AAUP.

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Item 14 in the Course Sizing Assessment should highlight and document the significant changes to course assignments and activities, course learning goals and outcomes, programmatic assessment metrics, retention and graduation rates, as well as other students or faculty workload aspects. With the course information assembled and the impacts assessed, a discussion can ensue between administrators and the affected faculty and department or program chairs with all factors including budgetary concerns can be brought to the table. Tradeoffs can be made and a reasonable decision that is suited to the specific course can be made.

Section 4 – Conclusions and Recommendations

We and the relevant literature (Appendix B) find that, in general, increasing class sizes is neither good for students nor for faculty. Educational quality suffers. Increasing class size also has negative impacts on student retention. However, given budgetary challenges faced by Portland State, increasing class sizes is regularly considered. Increases in class sizes have different effects on different classes. Any decisions that are made to increase class size should include a systematic evaluation of the effects of the change beyond budgetary and accreditation concerns. Not all classes are impacted equally and an assessment at the individual class level is needed. Across the board changes to class size are bound to create many problems for students, for faculty and for a program's retention rates and reputation.

This report provides a tool to assess the salient factors and impacts involved in changing individual class sizes with respect to educational quality, student issues and faculty concerns. The output of this proposed assessment tool provides a baseline for discussion of this important topic. We believe that the proposed tool may also be applied more broadly. Specifically the tool could be used by faculty to optimally size a new or existing classes. The approach could also be used to assess the impacts of converting a face-to-face class to online/hybrid class or vice versa.

It is hoped that this tool will be used so that appropriate decisions about class size changes will be made in challenging budgetary environments.

Appendix A: Class Sizing Assessment

Instructions: Complete the table.

	List Items
1. Course number, title, section number, and subject matter	List the course number, title, section number, and short description of the course
2. Course level	Identify the level of the course Lower division, Upper Division, Masters or Ph.D.
3. Course Type and Delivery Mode	Use the list in Table 1 to identify the course type and its modality. State how often the course meets. If the course is online, is it synchronous or asynchronous? If the course is hybrid, what is the percentage of seat time for the course?
4. Proposed change to class enrollment	State current class size limit and the proposed change. Include any other documentable aspects of the proposal including instructional resources provided to support the change in enrollment.
5. Class Components	Use the list above in Table 2 to identify and list all the components that comprise the course
5A. Class Component Impacts	Discuss how the course components above will be impacted by the proposed class size change in (5)
6. Course Assignments	Use the list above in Table 3 to identify and list all the kinds of course assignments that comprise the course
6A. Course Assignment Impacts	Discuss how the course assignments above will be impacted by the proposed class size change in (6)
7. Course Learning Objectives	List the course learning objectives this course is intended to achieve
7A. Course Learning Objective Impacts	Discuss how the course learning objectives above will be impacted by the proposed class size change in (7)
8. Program Defined	List the program level learning objectives this course is intended to support

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Learning Objectives	
8A. Impacts to Program Defined Learning Objectives	Discuss how the program learning objectives above will be impacted by the proposed class size change in (4)
9. University Defined Metrics	Identify key university level metrics that this course is intended to support (e.g. retention, graduation, and placement)
9A. Impacts to University Metrics	Discuss how the university metrics above will be impacted by the proposed class size change in (4)
10. Impacts on students	Describe how students will be impacted by changing the class size as has been proposed
11. Impacts on Faculty Workload	Describe how faculty workload will be impacted by changing the class size as proposed
12. Ability to Mitigate increases in faculty workload	Describe how or if changes in faculty workload can be mitigated by providing lower cost student or other resources.
13. Any Other Comments	List any other salient impacts and any other comments not listed above.
14. Summary of Overall Impact on Educational Quality	Describe the most salient impacts and provide an overall assessment of the feasibility of changing class size as proposed in Item 4 and it's impact to overall educational quality.

Appendix B – Annotated Bibliography

[1] Large Class Size and Student-Lecturer Learning Experiences at the Tertiary Level

Ponnan, R., Malek M.A., and Ambalavanan B.

Assessment for Learning Within and Beyond the Classroom: Taylor's 8th Teaching and Learning Conference 2015 Proceedings, pages 269-283, Published in 2016

Maintaining harmonious classroom environment is an important aspect of student-lecturer relationship. Harmonious learning environment also greatly depends on the size of the classroom and student-lecturer interactions. Large students' enrollment into tertiary institutions can be attributed to one of the several causes. Of late budgetary concerns have quickly led to the establishment of large-sized classes, affecting students' performance and hence their classroom relationship with lecturers. Literature reviewed suggests that there were several arguments against large-sized classes that form the basis for this research, namely (1) over-reliance on lecture; (2) passive student engagement; (3) reduced lecturer interaction/feedback with students; (4) reduced depth of students' thinking; (5) reduced depth of course objectives and learning strategies used by students outside the classroom; (6) lower-level academic achievement and performance; (7) course dissatisfaction with the learning experience; and (8) lower student rating of course instructions. This is an empirical study by three lecturers involving over three hundred students in a university setting. The study was done by conducting interviews, obtaining students' perceptions and classroom observation over two semesters in the same university setting. The results and findings are presented in the form of discussions and implications for action. The findings in this paper suggest that lecturers' affective behavior such as personal bias had an impact on the classroom relationship. Also discussed are suggestions on how teachers should avoid displaying specific behavior as personal emotion. Student-lecturer relationship along a professional attitude could be an important factor in determining the successful teaching and learning engagement in large-small classrooms. The study would benefit lecturers, education administrators in developing new approaches, assistances, and facilities to teaching and learning.

[2] Class Size Effects on Student Performance in a Hispanic-Serving Institution

Benjamin N. Matta, Joseph M. Guzman, Sue K. Stockly, and Benjamin Widner

The Review of Black Political Economy v42 n4 (201512): 443-457, 2015

Overlooked in higher education student retention policies is the effect of class size on student achievement. Decreasing constant-dollar legislative appropriations and growing undergraduate enrollments will continue to strain instructional budgets. One obvious administrator response is to increase class sizes, which raises concerns of negative effects on minority student achievement. Reported are findings that class size does exercise negative effects on the academic performance of Hispanic students.

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[3] Does class size matter?

Schanzenbach, D. W.

Pp. 565–581 in: Learning from the federal market–based reforms: lessons for ESSA. Edited by: Mathis, W. J., and Trujillo, T. M. Book Series: National Education Policy Center Series
ISBN:978–1–68123–503–5; 978–1–68123–504–2
2016

Abstract

Public education has undergone major reforms in the last 30 years with the rise in high–stakes testing, accountability, and charter schools, as well as the current shift toward Common Core Standards. In the midst of these reforms, some policymakers have argued that class size does not matter. This opinion has a popular proponent in Malcolm Gladwell, who uses small class size as an example of a “thing we are convinced is such a big advantage [but] might not be such an advantage at all.”

These critics are mistaken. Class size matters. Research supports the common–sense notion that children learn more and teachers are more effective in smaller classes.

This policy brief summarizes the academic literature on the impact of class size and finds that class size is an important determinant of a variety of student outcomes, ranging from test scores to broader life outcomes. Smaller classes are particularly effective at raising achievement levels of low–income and minority children.

Considering the body of research as a whole, the following policy recommendations emerge:

- Class size is an important determinant of student outcomes, and one that can be directly determined by policy. All else being equal, increasing class sizes will harm student outcomes.
- The evidence suggests that increasing class size will harm not only children's test scores in the short run, but also their long–run human capital formation. Money saved today by increasing class sizes will result in more substantial social and educational costs in the future.
- The payoff from class–size reduction is greater for low–income and minority children, while any increases in class size will likely be most harmful to these populations.

Policymakers should carefully weigh the efficacy of class–size policy against other potential uses of funds. While lower class size has a demonstrable cost, it may prove the more cost–effective policy overall

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[4] Where class size really matters: Class size and student ratings of instructor effectiveness

Bedard, K., and Kuhn, P.

ECONOMICS OF EDUCATION REVIEW; 27(3):253–265

DOI: 10.1016/j.econedurev.2006.08.007

JUN 2008

Abstract

We examine the impact of class size on student evaluations of instructor performance using data on all economics classes offered at the University of California, Santa Barbara from Fall 1997 to Spring 2004. A particular strength of this data is the opportunity to control for both instructor and course fixed effects. In contrast to the literature examining class size effects on test-based outcomes—where results can vary considerably across specifications—we find a large, highly significant, and nonlinear negative impact of class size on student evaluations of instructor effectiveness that is highly robust to the inclusion of course and instructor fixed effects.

[5] Factors promoting educational attainment in unfavorable socioeconomic conditions

Ferrera, J. M. C.

Revista de Educacion 370:172–198

DOI: 10.4438/1988–592X–RE–2015–370–302

October–Dec 2015

Abstract

This paper is focused on studying resilient students, i.e., those who obtain high achievement test scores despite the fact that they are facing an unfavorable socioeconomic environment. Hence, we concentrate on schools with students from more disadvantaged background and, among them, we select those students with better academic results with the aim of finding some common features related to their characteristics and abilities as well as the activities carried out by schools. Using this strategy, our emphasis is more placed on factors that can be affected by educational policy measures than on structural factors. For this purpose, we use information from Spanish students participating in PISA 2012. Once we have identified resilient students according to a criterion supported by the previous theoretical literature, we estimate a logistic multilevel model in which we include various individual and school regressors. The purpose consists of identifying which variables are associated with the probability of belonging to the group of resilient students. The results show that, apart from some individual variables, schools with a higher proportion of this type of students are characterized by having small classes, maintaining certain level of discipline and low levels of absenteeism. All these variables are related to the quality of teaching, thus this factor can be considered as a key factor to encourage

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students to overcome the difficulties of an unfavorable socioeconomic background and make the best possible use of their potential.

[6] An examination of class size reduction on teaching and learning processes: a theoretical perspective

Harfitt, G. J. and Tsui, A. B. M.

BRITISH EDUCATIONAL RESEARCH JOURNAL

41(5):845-865

DOI: 10.1002/berj.3165

October 2015

Abstract

The question of how class size impacts on student learning has been debated for some time, not least because it has substantial financial implications for educational policy. The strength of this debate notwithstanding, results from numerous international studies have been inconclusive. The study from which this paper stems sought to conceptualize the effects of class size on teaching and learning processes, an under-researched area in this field. To do that, the study explored qualitative differences in learning processes in large and small classes, drawing on social learning theory and the conceptual framework of community of practice to elucidate any differences. The data set includes classroom observations and interviews with students and teachers in four pairs of large and reduced-size English language classes in four Hong Kong secondary schools. Findings show that students were more motivated and engaged in their learning in the small classes studied. They also showed that the characteristics of a community of practice were more evident in the smaller classes. This paper concludes that it is the conditions that foster the development of a community of practice that have a critical role in bringing about high quality learning and that these conditions tend to be more easily met in smaller classes although there is no necessary relationship between the two.

[7] Class Size Reduction and Student Achievement: The Potential Tradeoff between Teacher Quality and Class Size

Jepsen, C., and Rivkin, S.

Journal of Human Resources, 44(1):223–250

Winter 2009

DOI: 10.1353/jhr.2009.0008

Abstract

This paper investigates the effects of California's billion-dollar class-size reduction program on student achievement. It uses year-to-year differences in class size generated by variation in enrollment and the

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state's class-size reduction program to identify both the direct effects of smaller classes and related changes in teacher quality. Although the results show that smaller classes raised mathematics and reading achievement, they also show that the increase in the share of teachers with neither prior experience nor full certification dampened the benefits of smaller classes, particularly in schools with high shares of economically disadvantaged, minority students.

[8] Class size and teacher effects in higher education

Sapelli, C., and Illanes, G.

ECONOMICS OF EDUCATION REVIEW; 52:19–28

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Abstract

Using student evaluations of their instructor as an outcome measure, we estimate and compare class size and teacher effects for higher education, with an emphasis on determining whether a comprehensive class size reduction policy that draws on the hiring of new teachers is likely to improve educational outcomes. We find that first time teachers perform significantly worse than their peers, and we find substantial class size effects. Hence higher education institutions face a tradeoff if they wish to increase admission. This tradeoff implies that as class size increases, at first the negative class size effect is smaller than that of introducing a first time teacher. However, beyond a certain level, the class size effect dominates and it is better to create a new class with a first time teacher?

Academic Advising Council

Report to Faculty Senate, April 2017

Council Membership: Abel de la Cruz, COTA; Andrew Rice, CLAS; Becki Ingersoll, ACS; Becky Sanchez, SBA; Casey Campbell, CUPA; Darrell Grant, COTA; Elizabeth Benner, SPH; Jodi Stiegemeyer, MCECS; J.R. Estes, UNST; Karen Haley, GSE; Kate Constable, SSW; Marlon Marion, DMSS; Martha Dyson, CLAS; Mary Vance, ACS; Melissa Yates, CLAS; Randi Harris, OAA; Shirley Jackson, CLAS.

Chairperson: Carla Harclerod, ACS

Ex-Officio: Cindy Baccar, ARR; Jim Hook, MCECS; Robert Mercer, CLAS; Sy Adler, USP; Sukhwant Jhaj, OAA

Consultants: Zach Markiss, OIRP, Kara Hayes, OAA.

Charge of the Academic Advising Council: The Academic Advising Council promotes a positive and productive advising environment for advisors and students. Members will be responsible for reviewing the current status of advising and making recommendations on best practices regarding policies and processes related to academic advising campus-wide.

The Academic Advising Council's current and future engagement for the 2016-17 year:

1. Academic and Career Advising Redesign: In November 2016, the final recommendations established by the Academic and Career Advising Redesign Work Group on the advising structure, roles, common practices, student milestones, and advising pathways were presented to the Academic Advising Council followed by a discussion on questions and challenges to address during implementation. The Work Group's recommendations were approved by Provost Sona Andrews in December 2016, and the Final Report of the Work Group's process of engagement, insights, and recommendations was distributed and published across the advising community (see Academic and Career Advising Redesign Final Report: goo.gl/Alw34C).

The Advising Council reviewed the three phases of the implementation plan in February 2016, and the Associate Vice Provost for Advising and Career Services solicited participation from Council members at that time. Additionally, in February, work groups were formed through the Academic Advising Council to further define the Student Advising Milestones outlined in the Academic and Career Advising Redesign Report. These milestones include the following: Mandatory first year advising no later than the

second term, mandatory career exploration sessions, financial planning conversations and tools to enhance financial literacy, major verification process to ensure students have explored and understood their declared major, and graduation sign off plan. The Advising Council will provide input on the five milestones through May 2017. The Work Group focused on major verification will develop recommendations on a major declaration policy to present to Faculty Senate.

Implementation of the advising structure, including the Pathway Advising Model, roles, common practices, and required student advising milestones, should be completed by December 2017. Other discussion topics related to Academic and Career Advising Redesign include the implementation of an interim advising structure, initial change in reporting lines, and the hiring of Pathway Advising Directors (see Academic and Career Advising Redesign Implementation Phases and Milestones Document: goo.gl/4EEmj1).

2. Common Advising and Analytics Software: PSU continues to work on projects that increase advising capacity, revitalize advising systems, and improve the visibility of student support services at PSU. These projects include: The Coordinated Service Network between advising, Financial Aid, Bursar's Office and Registrar's Office; personalized Interactive Degree Maps; Degree Audit Improvement to DARS report; redesign of myPSU to offer online services to students; and the Academic and Career Advising Redesign. Leads and team members for the projects have provided ongoing updates to the Advising Council, and Council members have provided input as appropriate (see Student Success Project Pages: Coordinated Service Network: goo.gl/v0LVFA; Interactive Degree Maps: goo.gl/v60C0i; Degree Audits Improvement: goo.gl/gVm0vf; Redesign myPSU: goo.gl/9a9H9g; Academic and Career Advising Redesign: goo.gl/YquaJR).

3. Hiring and Professional Development for the Advising and Career Services Community: Advisor professional development was identified through a survey to the Academic Advising Council as one of the goals to address in the 2016-17 year. Eleven new professional advisors were hired and onboarded in Fall 2016 in an effort to increase PSU's advising capacity and enhance the relationship between advisors and students. The Professional Development Committee, including members of the Academic Advising Council and other individuals from the advising and career services community, has focused on creating, offering, and facilitating professional development opportunities. Ongoing updates have been presented to the Advising Council. These opportunities include collaborations with Student Affairs (Registrar, Student Financial Services, Orientation), Global Diversity & Inclusion, as well faculty (GSE, SBA). Faculty-led workshops and classes on building cultural competency, creating professional development plans, and enhancing personal finance and financial literacy tools (Business Finance 218) are some of these new opportunities. Informational workshops on tools/resources available to the advising community (Banner) have also been included.

4. Long term and short term goals: In Fall 2016, the AAC provided input on 2016-17 short and long-term goals through survey and discussion, prioritizing the following:

- Transfer student support and community college connections
- Retention and pro-active advising strategies
- Career advising
- Cultural climate and awareness
- Student success metrics and long-term assessment
- Faculty engagement and support in AAC and student success initiatives.

Both the Academic and Career Advising Redesign implementation phases and milestones, including the five student advising milestones and advisor professional development emphasis, will address some of the key focus areas above. In Spring 2017, the Advising Council will work on potential strategies and next steps to address meeting the gaps not filled by other initiatives and committee work.

5. Input on Policies, Practices, & Programs: In addition to the initiatives listed in this report, the AAC has provided input on the 4-Year Degree Guarantee (4YDG) initiative; tracking data and retention markers at PSU (presentation by OIRP); marketing materials surrounding financial aid during Summer 2017; and the process for communicating and including faculty advisors in advising initiatives.

In Spring 2017, the AAC will provide input on the draft Major declaration policy recommended by the Academic and Career Advising Redesign Work Group. The policy will serve the major verification milestone, but it is also critical for advising pathways and assigning advisors to students. The AAC will also provide input and feedback on recommendations proposed by the other Academic and Career Advising Redesign Milestone Work Groups, as well as provide input on the Interactive Degree Maps student success project.

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Academic and Career Advising Redesign Implementation Phases & Milestones

We have divided the Academic and Career Advising Redesign implementation process into three phases, with the long-term goal of implementing the advising structure, including the Pathway Advising Model, roles, common practices, and required student advising milestones by the end of December 2017. The first phase of implementation will establish an interim coordinated advising structure, which will include the hiring of Pathway Advising Directors through a competitive internal search process. The second phase of implementation will focus on establishing the Pathway advising supervision structure and clearly articulating various roles within the advising and career services community. The last phase of implementation will include advisor training, the creation of a communications plan for our students, as well as time to ensure our electronic systems are prepared to support our redesign efforts by December 2017. Beyond these initial three phases, there will be ongoing efforts to refine system components and evaluate the system's overall impact on student success.

Phase 1: Implement Interim Coordinated Advising Structure & Hire Pathway Advising Directors

Timeframe: January 1, 2017 - May 31, 2017

During the first phase of the Academic and Career Advising Redesign implementation process, we will transition from PSU's current advising model to an interim coordinated advising structure. The PSU advising and career services system will begin reporting to Carla Harclerod, the AVP for Advising and Career Services, on March 1, 2017, and while working within this interim advising structure to support our advising and career services community and our students, we will simultaneously conduct a competitive internal search for Pathway Advising Directors. In addition, through the Academic Advising Council, we will begin articulating details of required student milestones and position descriptions for staff in the future Advising Hub.

Milestones

- Develop and implement interim advising structure to include initial change in reporting lines
- Develop position description for Pathway Advising Directors
- Determine funding for Pathway Advising Director positions
- Conduct competitive internal search for Pathway Advising Directors
- Convene work groups to articulate details of required student advising milestones
- Convene work group to develop recommendations to the faculty senate for major declaration policy
- Assess options for reconsidering electronic management of advisor assignments
- Identify, evaluate, and consider alternatives to create a unified appointment scheduling tool
- Develop position descriptions for advising support roles in the Advising Hub

Attachment G.4 (appendix)

Phase 2: Implement Pathway Advising Supervision Structure, Articulate Roles, and Develop Policies

Timeframe: June 1, 2017 - September 30, 2017

During the second phase of the Academic and Career Advising Redesign implementation process, Carla will work with Pathway Advising Directors to establish Pathway Advising supervision for professional advisors, which will include opportunities for department and faculty collaboration within each individual Pathway. This phase will also include the clear articulation of advising roles within the advising and career services community, as well as continued work to develop a major declaration policy consistent with the recommendations in the Academic and Career Advising Redesign Report.

Milestones

- Develop processes for assigning advisors to Pathways and subgroups in consultation with Pathway Advising Directors and departments
- Implement Pathway Advising Director supervision and change in reporting lines
- Establish exploratory advising practices in each Pathway
- Revise advisor position descriptions to be consistent with common practices and required student milestones
- Introduction of common practices and student advising milestones details, developed by work groups, to the advising and career services community
- Update Advising Handbook to include common practices and references to student milestones
- Complete major declaration policy recommendations to be submitted to the faculty senate
- Collaborate with Deans, or designee, to determine collaborative approach for advising school and college initiatives, including implementation of 2017-18 enrollment plan
- Articulate design for career counselor/career center in the Hub
- Develop a comprehensive training plan for new and existing advisors on new advising structure, majors, (including interdisciplinary majors), and common practices
- Establish and articulate clear roles for assigned advisors, career counselors, faculty advisors, and exploratory advising
- Develop changes to electronic systems in order to support advisor assignments and student-facing appointment scheduling

Phase 3: Implement Advisor Training Plan, Finalize Advisor Assignments, and Develop a Comprehensive Student Communications Plan

Timeframe: October 1, 2017 - December 31, 2017

During the third phase of the Academic and Career Advising Redesign implementation process, Carla will work collaboratively with each Pathway, and their associated academic departments, to provide comprehensive training for advisors on the advising structure, majors, common practices, student advising milestones, student scheduling system, and advisor assignment process. Additionally, this third phase will focus on ensuring we have a communications plan for students, as well as electronic systems in place to support a late December 2017 redesigned system launch.

Milestones

- Implement comprehensive training plan for new and existing advisors on new advising structure, majors (including interdisciplinary majors), and common practices
- Finalize advisor Pathway assignments in preparation for winter term 2018 launch of the Pathway model
- Review with Deans, or designee, advising school and college initiatives, including implementation of 2017-18 enrollment plan
- Implement student-facing appointment scheduling

Attachment G.4 (appendix)

- Submit major declaration policy recommendations to faculty senate
- Implement faculty senate approved major declaration policy
- Implement changes to electronic systems in order to support advisor assignments and student-facing appointment scheduling
- Establish a plan to implement faculty advising in each Pathway
- Develop and begin implementation of a comprehensive communications plan that includes: information on common practices, connecting students to IDM, CSN, myPSU, how students identify their advisor, pathways, what it means to be an exploratory student.
- Establish assessment plan to determine impact of redesigned system on student success
- Develop and implement reports for evaluating student use of advising resources and advisor contact with students via virtual, email, phone, and in-person methods.
- Complete initial redesigned system launch

Ongoing Projects

- Develop detailed proposal for the Transfer Success Center
- Work with New Student Orientation to determine how to communicate advising structure and assigned advisor information
- Communicate with our Community College Partners
- Review and adjust milestone practices
- Review with Deans, or designee, advising school and college initiatives, including implementation of enrollment plans
- Assess impact of redesigned system on student success

Questions?

Contact Carla Harcleroad, AVP for Advising and Career Services

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Attachment G.5

Institutional Assessment Council Annual Report to the Faculty Senate

March 13, 2017

Council Charge

The Institutional Assessment Council (IAC) creates principles and recommendations for assessment planning that are sustainable and learning-focused, and provides support aimed at enhancing the quality of student learning through assessment activities. The Council has designed a framework for promoting and supporting assessment long term, both at the program and institution levels. The IAC serves as the primary advisory mechanism for institutional assessment planning and coordinates with the assistant and associate deans group the implementation of systematic Annual Assessment Updates and Academic Program Review by the schools and colleagues.

IAC Members 2017-2018

Members represent a wide range of departments and programs, and have significant roles related to assessment practices and policies.

Janelle D. Voegele, Co-Chair IAC	Director, Teaching, Learning and Assessment
Vicki L. Wise, Co-Chair IAC	Associate Director for Teaching, Learning and Assessment
Mariela Bao	Graduate Assistant, Office of Academic Innovation
Sarah Beasley	Humanities/Social Science Librarian, Library
Bill Becker	Professor of Science Education, Director, PSU Center for Science Education
Rowanna Carpenter	Director of Assessment and Upper Division Clusters, University Studies
Micki M. Caskey	Associate Dean for Academic Affairs, Graduate School of Education
Amy L. Donaldson	Associate Professor, Speech & Hearing Sciences
Jeff Gerwing	Professor, Environmental Sciences and Management
Charles Klein	Assistant Professor, Anthropology
Michele Morales	Assistant Professor, MSW-DO Ashland Site Coordinator
Betsy Natter	Interim Director, Honors Program
Brian Sandlin	Accreditation and Compliance Coordinator, Academic Affairs
Aimee Shattuck	MSW Assistant Dean of Student Life Enrollment Management & Student Affairs
Ellen West	Associate Professor of Management

IAC Priorities

While the IAC is primarily focused on normalizing program assessment practices within a learning organization, it also understands the need to respond to external accrediting requirements, such as those specified by the Northwest Commission on Colleges and Universities (NWCCU).

NWCCU's articulation of Standard Four for Effectiveness and Improvement informed the IAC's efforts to create streamlined and efficient assessment planning and reporting processes:

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- 4.A.2: Faculty have a primary role in the evaluation of educational programs and services
- 4.A.3: The institution documents, through an effective, regular and comprehensive system of assessment of student achievement, that students who complete its courses, programs and degrees ... achieve identified course, program and degree learning outcomes
- 4.A.6: The institution regularly reviews its assessment processes to ensure they appraise authentic achievements

Following from a recent Year Seven NWCCU Self-Evaluation Report and a hosted team of on-site evaluators, NWCCU in their reaffirmation letter of February 1, 2016 recommended the following:

Recommendation 2

The Assessment Table and interviews indicated that Portland State University does not yet regularly and comprehensively assess all student program learning outcomes for undergraduate and graduate programs (Standard 4.A.3). Additionally, graduate program student learning outcomes were not published for all graduate programs (Standard 2.C.2). The Commission recommends that the assessment of student learning outcomes be systematically accelerated such that continuous improvement resulting from assessment leads to enhancement of student achievement and to a meaningful evaluation of mission fulfillment (Standards 2.C.2, 4.A.3, and 4.B).

Prior to the most recent NWCCU visit and Recommendation, the IAC had taken steps to accelerate assessment activities on campus. Beginning in 2013 with the reconstituted Institutional Assessment Council (IAC), the partnership between the IAC, the Office of Academic Innovation (OAI), and Office of Academic Affairs (OAA) strengthened around shared goals for quality systemic assessment of student learning. The collaboratively developed goals and plans align faculty engagement, best practices in assessment, and meets NWCCU standards and expectations.

In 2016-17 many of the IAC efforts to improve and accelerate the assessment activities on campus have come to fruition in the following ways.

- Revised the **Academic Program Review Guidelines** to require more detailed information on a program's assessment of student learning outcomes. (Attachment A)
- Developed an **Annual Assessment Update** for all programs to inform the Office of Academic Affairs of PSU assessment activities. (Attachment B)
- Created a support mechanism for programs to improve their assessment activities and practices.

The IAC developed a plan to systematically link program-level student learning assessment with **Academic Program Review (APR)**, a process that will result in a thorough review of all programs over time. The Provost, office of the Vice Provost for Academic and Fiscal Planning, and the IAC are working to ensure ongoing support for conducting quality assessment. To this end, the IAC has created a **Rubric** (Attachment C) aligned to NWCCU standards to ensure that feedback to all programs is based on best assessment practices. Moreover, the APR report template reflects the influence of the rubric for programs' reporting progress in assessment efforts. Fall 2016 was the first new cycle of the APR process.

Additionally in 2016, the OAA and IAC created an **Annual Assessment Update** that all academic programs will complete each year. The initial test of this implementation will provide PSU with a baseline of assessment practices. OAI will apply the best practice rubric to each assessment update, and

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will provide formative feedback to **support** all academic programs in quality assessment practice. OAI will work with individual programs on any aspect of assessment needing improvement. This formative process should result in improved quality and will be evident in 2017-18 annual reporting. During this time, OAI will also work collaboratively with the IAC to ensure that programs are receiving the assessment support they need and that quality program-level assessment practices receive recognition.

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Attachments

Attachment A: Academic Program Review Guidelines (excerpt)

APR Section V. Assessment of Student Achievement. The Institutional Assessment Council (IAC) has developed a rubric aligned with NWCCU standards to provide guidance to programs on the assessment process and developing an assessment plan. The Office of Academic Innovation (OAI) can assist programs in development of an assessment plan.

- A. Evidence of Student Learning
 - List and number the expected student learning outcomes for your program. Outcomes should explicitly describe what students know, understand, or are able to do. For undergraduate programs, draw connections between these program level learning outcomes and the PSU Campus Wide Learning Outcomes.
 - Describe the kinds of experiences that you expect students to have inside and outside of the classroom to meet these learning outcomes.
- B. Evaluation of Student Academic Performance
 - Define meaningful curricular goals and present defensible standards for evaluating whether students are achieving those goals.
 - Specify what direct measures you are using to assess student learning. Direct assessment includes students' demonstration of knowledge, skills, and abilities.
- C. Analysis of the Results of Assessing Student Academic Performance
 - Report and discuss the findings from each learning outcome assessment activity.
 - Review Assessment Plan to see if any changes or modifications will create a more meaningful process.
- D. Post-graduate Outcomes for the Program
 - Articulate how you prepare students for successful careers, meaningful lives, and where appropriate, further education.
 - Collect and provide data about whether you are meeting these goals.
- E. Incorporate changes Based on Assessment Evidence of Student Learning Outcomes
 - Describe how the assessment findings are used to improve student learning and classroom instruction. How the assessment findings are used to assist in strategic program planning?
 - Provide examples that show how the program has closed the feedback loop and used assessment findings to review, evaluate, and modify the curriculum.

Section V Supporting Data	
<i>Common elements (required):</i>	<i>Potential elements:</i>
<ul style="list-style-type: none"> - Program level learning outcomes - Assessment plan - Measures and indicators used to assess student learning - Number of students assessed 	<ul style="list-style-type: none"> - Learning outcomes alignment with workforce or post-graduate goals - Metrics used to determine long-term outcomes of student's experiences - Baseline and trend information of student learning and progress - Alignment of program level learning outcomes with campus wide learning outcomes

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Attachment B: Annual Assessment Update

The purpose of this update is to understand the current state of the assessment of student learning outcomes across all academic programs on campus. This update also speaks to a larger goal of satisfying the Northwest Association of Colleges and Universities accreditation standards.

Please submit a separate update for each program with a distinct assessment plan. If several programs use the same assessment plan one submission is sufficient.

The questions are (essentially):

- Do you have an assessment plan? Yes/no (upload plan or provide URL)
- Have you implemented it? Yes/no
- Have you used the findings to revise the program? Yes/no
- Are the student learning outcomes posted online? Yes/no (provide URL)

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Attachment C: Rubric for Evaluating Assessment Plans and Progress

The purpose of this rubric is to assist programs in their assessment planning, and to prepare them for the Academic Program Review process. This rubric is aligned with NWCCU (Northwest Commission on Colleges and Universities) standards for institutional assessment reporting as well. This rubric will allow for consistency in assessment reporting, and it will simplify expectations for quality. Please note that many specialized accrediting bodies have their own expectations for meeting accrediting performance standards. It is more than likely that those standards may exceed the ones specified here.

Criterion	(1) Does not meet expectations	Meets expectations (2)	Exceeds expectations (3)
Assessment Plan	Does not meet one or more criteria specified in the met expectations column	Formal plan has identified <ul style="list-style-type: none"> - learning outcomes; - appropriate assessments, including at least one direct measure of student learning; - a process to analyze the results of the outcomes assessed; - a plan to adjust or improve program from results of the learning outcomes assessed; and - faculty involvement in assessment planning. 	Exceeds by one or more criteria (specified in the met expectations column), for example: <ul style="list-style-type: none"> - assessments include approx. 50% direct measures. - plan specifies assessment for continuous improvement of the program. - plan for multi-year data collection.
Alignments	Does not meet one or more criteria specified in the met expectations column	Clear relationships between student learning outcomes at the program level with <ul style="list-style-type: none"> - course-level outcomes; - campus-wide learning outcomes, if undergraduate program; - professional standards, if applicable. 	Evidence that program alignments are revisited annually to reflect changes
Learning Outcomes	Does not meet one or more criteria specified in the met expectations column	Evidence that expected student learning outcomes identify the intended knowledge, understandings, or abilities that students will acquire through the academic program	Evidence that program communicates program-level learning outcomes to students
Assessment Activities	Does not meet one or more criteria specified in the met expectations column	Evidence that assessments activities <ul style="list-style-type: none"> - align to student learning outcomes ; - are appropriate measures to assess learning outcomes; and - engage faculty in assessment implementation process. 	Evidence that assessments are reviewed annually

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Criterion	(1) Does not meet expectations	Meets expectations (2)	Exceeds expectations (3)
Data Quality	Does not meet one or more criteria specified in the met expectations column	For at least A PORTION of program assessments there is evidence of - process to check for inter-rater reliability, if applicable; - process to check for quality (see detail below); and - process to ensure sampling quality (see detail below).	For ALL program assessments: - process to check for inter-rater reliability, if applicable; - process to check for quality (see detail below); and - process to ensure sampling quality (see detail below).
Assessment Findings	Does not meet one or more criteria specified in the met expectations column	Results for outcomes collected and discussed. For example: - reporting addresses findings from each learning outcome assessment activity. - assessment findings are used to: 1) improve student learning, classroom instruction, and assessments; and 2) review, evaluate, and modify the curriculum in the programs.	Evidence that data are collected over time allowing for pre-post measures of student learning Findings used in strategic program planning

Data Quality

Basically what you want to know if your assessment method is credible. Here are some ways to check:

Quantitative Assessment:

- 1) Content Validity: Is there a match between test (assessment) questions and the content or subject area assessed?
- 2) Face Validity: Does the assessment appear to measure a particular construct as viewed by an outside person?
- 3) Content-related Validity: Does an expert in the testing of that particular content area think it is credible?
- 4) Curricular Validity: Does the content of an assessment tool match the objectives of a specific curriculum (course or program) as it is formally described?
- 5) Construct Validity: Does the measure assess the underlying theoretical construct it is supposed to measure (i.e., the test is measuring what it is purported to measure).
- 6) Consequential Validity: Have you thought of the social consequences of using a particular test for a particular purpose?

Qualitative Assessment:

- 1) Have you accurately identified and described the students for whom data were collected?

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- 2) Can the findings be transferred (applied to) to another similar context?
- 3) Is there dependability in your accounting of the changes inherent in any setting as well as changes to the assessment process as learning unfolded?
- 4) Can the findings be confirmed by another?

Sampling

For program review, we ideally want a combination of assessment evidence to address program goals. This evidence includes assessment of all students in the program at times, and assessing only a subset of the students at other times. We often see this difference in the choice to use quantitative vs. qualitative assessment methods.

Quantitative Methods

A randomly selected sample from a larger sample or population, giving all the individuals in the sample an equal chance to be chosen. In a simple random sample, individuals are chosen at random and not more than once to prevent a bias that would negatively affect the validity of the results. We strive in sampling for representativeness of the sample to the population from which it was drawn.

Qualitative Methods

Having a large number of students is not essential using qualitative methods, as the goals may be to 1) explore topics in depth, 2) try a new method that explores a topic of interest, and 3) the assessment method used is labor intensive (e.g., portfolio reviews), as an example.