

## **Responding to a Changing World Progress Under President Montgomery's Leadership**

The letter that the WMU-AAUP sent to the Board of Trustees says that President Montgomery's leadership has led to "little change or action" and that his leadership has not "influenced our direction as a university in any substantive way."

This assertion, and the letter as a whole, indicate that there is a chasm of understanding about where WMU stands today and how far we have come since the fall of 2017. This chasm no doubt contributes to our very different assessment of President Montgomery's leadership. As the governing body of the institution, we are reluctant to comment on the operational affairs of the University, as it is the domain of the President and President's Cabinet. But today we are moved to set the record straight.

When Dr. Montgomery arrived, we were a University facing systemic challenges on numerous fronts. Despite the quality education we were providing then, and continue to provide, those challenges were limiting the impact we could make for our students, and they were exacerbating enrollment and resource challenges. By their nature, systemic challenges defy easy fixes and often require multiple, interrelated steps to correct, the results of which take years to effectuate. We have assembled evidence of the meaningful steps taken to address these systemic challenges under the president's leadership.

### **1. Enrollment Trends**

- a. Enrollment challenges are not new for WMU and did not start under President Montgomery. Enrollment at WMU peaked nearly two decades ago.
  - i. In 2002 WMU had 29,732 students. By fall 2017 when President Montgomery took office, enrollment had declined in almost every preceding year for a total reduction of nearly 7,000 students or 23%.
  - ii. In 2002 WMU accounted for 10.5% of students attending public universities in Michigan. Just five years later in 2007, WMU accounted for only 8.4% of the students at Michigan public universities. A decade after that when President Montgomery took office the share had declined to 7.9%. Thus, WMU's enrollment performance relative to its peers had been steadily declining for the 15 years prior to Dr. Montgomery's appointment.
- b. COVID-19 continued to affect enrollment in fall 2021 at almost every public university in Michigan and enrollment was down nationwide.
  - i. Thirteen of Michigan's 15 public universities saw an enrollment decline in 2021, so the decline was broad based. Michigan State's enrollment declined in 2021 as it has every year since 2018. CMU's enrollment has declined every year since 2014; it dropped about 11% in 2021. GVSU's enrollment also declined in 2021, as it has every year since 2016.
  - ii. There were almost 8,000 fewer (2.9% fewer) students enrolled in Michigan public universities in fall 2021 than in 2020.

- iii. Across the country fewer people are enrolling in colleges. National Student Clearinghouse data shows enrollment in higher education declining 2.7% in fall 2021, with a two-year decline of 5.1%. Nationally, public four-year institutions' enrollment dropped 3% in 2021—about the same as in Michigan.

c. Solutions

**Curricula and budget reforms to support enrollment**

- i. Our educational offerings are at the very heart of WMU's ability to fulfill its mission, "so that all may learn." Nothing is more central to those offerings than our core curricula. Led by the Faculty Senate, WMU established a new WMU Essential Studies curriculum and implemented it in fall 2020. This curriculum gives our students foundational skills and reinforces our belief in the power of a liberal arts education.
- ii. In 2021 the campus launched an interdisciplinarity initiative by inviting groups of faculty and staff to come together to build upon recommendations from a Faculty Senate work group. Interdisciplinarity has always been present at WMU but this initiative sought to serve as a catalyst for the development of new research and curricula at the intersection of academic disciplines. These areas reflect novel approaches to tackling some of our more vexing challenges. So far, 69 interdisciplinary programs have been proposed with 28 advancing to the second round. A new call for more proposals is expected later this spring.
- iii. The campus' new Strategic Resource Management (SRM) budget model was developed over the past two years under President Montgomery in consultation with administrators, faculty and staff from across campus. This new model was developed in response to stakeholder comments about the lack of flexibility in our historic budgeting approach. SRM is an enormous, Universitywide undertaking designed to ensure that majors with large enrollments get the support they need and that new programs or majors get enhanced support as they grow. It is designed to spur program innovation and resource the creation of majors and classes that attract students. When combined with the new WMU Essential Studies, it enhances our ability to make sure our students have both the foundational skills and broad knowledge of a liberal arts education and cutting-edge specialty skills of majors that meet their academic and career needs.

**Tuition and financial aid reforms to support enrollment**

- iv. In 2017, we evaluated our tuition-setting policies and determined that reducing nonresident tuition would make Western more appealing to out-of-state students. We reduced the out-of-state tuition differential from more than double the resident rate to a 25% premium. As a result, undergraduate nonresident enrollment has more than doubled and this

fall, nonresidents comprise 26.2% of undergraduate enrollment compared to only 10.6% in 2017.

- v. As an access institution, we are concerned with the rising cost of tuition due to the shifting financial burden from the state to the student. So in 2018, we committed to raising our financial aid pool by the same percentage as tuition increases. We have done so in every budget since. This approach has added \$3.8 million more financial aid dollars for students in the 2019-20, 2020-21 and 2021-22 budgets. We have also optimized our financial aid policy starting in 2020-21 to ensure that aid is disbursed as efficiently and effectively as possible.
- vi. By leveraging resources made available by the Empowering Futures Gift and pairing that generous philanthropic support with institutional dollars, we created the Bronco Promise. Announced in December, this newly established scholarship allows any Michigan high school graduate with a household income of \$50,000 or less and total assets of \$50,000 or less to attend Western free of tuition or certain fees.
- vii. We also announced 110 housing scholarships paired with a new living learning community designed to help students find friends and develop a sense of belonging.
- viii. In 2019, we restructured tuition and fees for graduate students to make it easier for them to understand how WMU compares to our competitors.
- ix. In fall 2021, we simplified our tuition structure for undergraduates to allow our students and their families to more easily compare the great value of WMU to our competitors. It is also a step toward allowing us to ensure our tuition rates are competitive with our peers.
- x. National search firm WittKieffer is leading our search for a new Associate Vice President for Enrollment Management, a role we expect to have in place in 2022.

**Other campus changes to support enrollment growth**

- xi. By fall 2017, our physical campus had fallen short of what our students expect and many of our competitors offer. In each of the last three years, we have surveyed admitted students who choose not to attend WMU. Each of those years, “campus environment” has been cited more often than any other reason admitted students chose to not attend WMU. This challenge was reinforced in a 2019 survey of all audiences:

**What is your perception of the LOOK OF THE CAMPUS of each of the following schools?**

% who rated campus as VERY BEAUTIFUL				
	Undergraduate Prospects	Graduate Prospects	Parents of UG Prospects	Guidance Counselors
Top Competitors' Average	27%	24%	21%	25%
Western Michigan	14%	19%	16%	8%

- xii. Our building projects are about attracting students and meeting their needs. We are not building vanity projects like “lazy rivers,” but buildings that contribute to our mission and enhance our ability to meet student needs, and make us a more attractive choice. Each eliminated building reduces the drain on our budget, lowers our carbon footprint, improves operating efficiency and beautifies the campus.

**Progress since the President’s arrival:**

1. Our pedagogy and instructional offerings were enhanced by the new state-of-the-art Aviation Education Center. And a renovated Dunbar Hall—our most heavily used academic building for WMU Essential Studies courses—offers similar promise when it opens in fall 2023. By aggressively pursuing state support under President Montgomery’s leadership, the University secured over \$45 million for these two projects, dramatically reducing their costs.
2. We have torn down the more than 60-year-old Elmwood Apartments, McCracken Hall, the “Little Three” residence halls and the strip mall on Howard Street. These buildings had outlasted their usefulness and were not only eyesores but also drains on our budget and contributors to our carbon footprint.
  - a. We continue to make progress taking obsolete buildings off line. Woodlawn Place, Welborn and Goldsworth Valley Apartments are all in the process of demolition; we will begin razing Henry Hall and the Bernhard Center this summer.
  - b. We have opened Arcadia Flats, which offers a new apartment option for upper-level undergraduates, keeping them on campus. Students who live on campus are more likely to remain enrolled and graduate at higher rates.
3. In the fall, we will open the new student center, which includes a new dining hall. A new admissions welcome center will be based in that new facility, creating a premier first-impression for prospective students. The student center is intentionally designed to help students find belonging and will be a crucial recruiting asset.

**Additional recruiting strategies**

- xiii. In early 2019, we extended our outreach to high school sophomores and juniors, whereas before we communicated primarily with seniors.
- xiv. Early outreach over the past three years has resulted in about 26,500 new qualified prospects for fall 2021 and 29,100 for fall 2022.
- xv. In 2019, WMU’s Upjohn Center for the Study of Geographical Change, Enrollment Management, the Office of Marketing and Strategic Communications (Marcom) and Advancement collaborated to identify

high-potential out-of-state markets for out-of-state advertising and recruitment efforts. Following the first year the Rethink Smart brand was launched in September 2019, applications from Indianapolis rose approximately 77%, Fort Wayne approximately 87% and Chicago approximately 3%. Applications from Indiana and Illinois rose approximately 42% and 8%, respectively.

- xvi. Each of the efforts has also contributed to record applications for the fall 2022 new incoming class, totaling 17,765. Right now, close to the end of application season, we are trending ahead again this year by approximately 8%.

Without question, we are not where we want to be in our enrollment and increasing our yield of those students who have applied and been admitted is our most crucial step. Every aspect of the students' campus experience inside and outside the classroom affects yield. Parents, teachers, peers and other influencers can affect which university they ultimately select. Now that we have gained strength in building the application pool, we are focusing on this important moment in the recruitment cycle.

- xvii. In 2019, we launched Deposit IQ which allows us to segment which accepted students are most likely to enroll so we can focus our yield outreach efforts strategically.
- xviii. We launched Merze Tate College this academic year, designed in part to enhance advising and facilitate the exploration we all know many college students need, whether they are undecided upon entry or change majors during their college career.
- xix. We are launching an effort this semester among colleges and student-facing areas like housing, dining and student engagement to offer high-touch, tailored engagements with admitted students.
- xx. We have five Admitted Student Events planned on campus and are launching new yield activities that appeal to different students. For example, we'll be holding local events in Detroit and Grand Rapids, and we will have our first Western Weekend for admitted students in April.
- xxi. Enhancing retention is a key element of our enrollment strategy and was one of the three R's named as part of Dr. Montgomery's presidential initiatives. The aforementioned efforts to standardize advising, the promotion among faculty of giving midterm grades, increasing the effectiveness of those introductory courses with rates of D, E and W grades, enhanced in-person outreach to unenrolled students, coupled with our emergency aid practices for upperclassmen, are all elements of the strategy to improve retention, persistence and ultimately enrollment.

## 2. Marketing and Branding

- a. After significant input from campus upon arrival, President Montgomery created and hired the first Vice President for Marketing and Strategic Communications, appointed June 2018.
- b. Our Rethink Smart branding was created through a five-phase, inclusive and evidence-based process that engaged the campus widely and was also based on primary and secondary research. The process was iterative, advancing through numerous prototypes. It was informed by interviews of campus community members, multiple town halls and design teams made up of faculty, students, staff and alumni. All told, 1,100 people were engaged in person as well as the WMU Foundation and Alumni Association boards. The process surfaced Purpose, Career and Well-being, built on a foundation of flexibility, as potential differentiators for the University, with wide appeal to prospective students and their families as well as influencers like guidance counselors.
- c. The new visual identity is often called “the rebrand” by nonmarketers. Our logos, colors and typefaces represent the brand, they are not the actual brand itself. The visual identity solves the very real problem of multiple logos and multiple color schemes. The fact that our colors are Brown and Gold and most of our apparel was black is a legitimate problem to solve.
  - i. The new visual identity was also developed collaboratively, this time with professional visual designers. The team included seven alumni and represented six departments. University leadership did make the decision to affirm and build on our historic and traditional colors of brown and gold. But once that decision was made, students, athletes and athletic leadership were consulted. Feedback that came from outside MarCom and was implemented included eliminating the first draft of a brown and gold Bronco and elevating the varsity W (now “circle W”) to the whole University’s brand, including athletics.
  - ii. Despite the criticism of using our historic and traditional colors and the new logos, it should be pointed out that the change has not harmed our apparel and merchandising sales. The logo was introduced on the first day of the second quarter of 2021. WMU’s sales for quarters 2 through 4 of 2021 are 13.9% higher than the same quarters the year before.
  - iii. On top of merchandise sales, our community’s support has not eroded as alumni giving has risen to a level not seen in years. We have seen an increase in the number of alumni giving back in each of the last three years. The first six months of the 2021-22 year have seen the largest number of alumni donors on record for that period, a number that is 30% higher than President Montgomery’s first year in office. Calendar year 2021, even without the Empowering Futures Gift, saw the highest total of dollars raised in Dr. Montgomery’s tenure by over 10% from the previous high. These trends are especially important given national trends in the opposite direction.

### 3. **President's Communication, Community Engagement and Collaboration**

The President acknowledged at the December 2021 Faculty Senate meeting that there was room for improvement in his communications and engagement with the campus community. He had been asked to be externally focused to aid in the start of the comprehensive campaign and promote revenue growth. That said, he has hardly been absent from the campus, and the administration's key initiatives have had broad campus engagement and faculty participation. Here are some examples:

- a. **The Racial Justice Advisory Committee** is focused on fighting systemic racism at WMU and includes 53 members of the Western community.
- b. **When planning for SRM**, the University had two campus town halls that were open to the entire campus community. There were also additional presentations at Faculty Senate (2), the Faculty Senate's Campus Planning and Finance Council (3), Academic Forum (2) and Provost Council (2). Eighty-one (81) faculty and staff participated in planning teams.
- c. **Employee Engagement Survey:** Under President Montgomery's leadership, Western launched the Employee Engagement Survey in 2019 with the goal of assessing the University's culture and making Western a great place to work. Representatives from the Faculty Senate and WMU-AAUP were on the steering committee that developed this survey. In order to move the results to action, President Montgomery and the cabinet held two campuswide forums in the fall 2019 semester to discuss the results and consider next steps. The cabinet was in the process of synthesizing the input from these forums and developing next steps when COVID-19 emerged in early 2020.
  - i. Changes in the modality of our work during the pandemic limited our progress on the survey results. Nonetheless, President Montgomery remained committed to making some advancement and asked the cabinet to move forward some of the ideas and activities inspired by the survey and forums. Those activities can be found in Appendix A. In addition, over the last year, Vice Presidents Anderson, Bott and Van Der Kley have held seven cross-division input sessions, engaging 190 employees.
  - ii. Cabinet members regularly meet with APA and PSSO, as well as with our collective bargaining partners. Cabinet members are currently engaged with APA, PSSO and other employee groups regarding our Reduction in Force policy and will soon engage the same groups as well as PIO, TAU and WMU-AAUP regarding our next Employee Engagement Survey.
- a. **Budget crisis response:** When University leaders determined that we had to immediately pivot to virtual education and potentially cut the general fund budget by as much as \$85 million to avoid an imminent threat to the University, the President held a Budget Town Hall to communicate our circumstances fully and transparently. Questions were taken live from those submitted by the audience and had not been pre-screened.
- b. **2020 and 2021 Fall Contingency Task Force.** The Provost convened a faculty task force that included representation from the WMU-AAUP and Faculty Senate to provide feedback and guidance on our 2020 fall start in the context of COVID-

19. This work was also amplified by the 16 WMUx Faculty Champions, who assisted peer faculty colleagues on online and hybrid pedagogy. This task force was reconvened in 2021 with many returning; feedback was largely provided on communication strategies.

- c. **Strategic planning** launched in fall 2021 and included a campuswide kickoff event, three campuswide town halls and multiple presentations. More than 250 individuals engaged in discussing mission/vision over the semester. Seven workgroups, composed of more than 150 faculty, staff and students are working on priority areas. Town halls will continue in the spring semester focused on these priority areas and on mission/vision/values.
- d. **Shared governance** has not changed under President Montgomery's administration and continues to follow the shared governance practice as established by the Board of Trustees on Dec. 8, 2015.

As to whether the President has been personally engaged, here are additional examples of personal, direct engagement.

- a. Prior to COVID in the 2018-19 academic year, the President had 127 engagements with students, faculty, staff and external stakeholders and 98 during the 2019-20 academic year, one third of which was disrupted by COVID.
- b. During the 2020-21 academic year President Montgomery began Community Conversations, small group discussions with faculty and staff that focused on specific topics.
- c. Since an in-person State of the University address was not possible during the 2020-21 school year, the President began the Western's Future Focus video series to keep the campus community focused on strategic initiatives and how they impact our students. These had far more views than the typical in-person audience at previous State of the University addresses.
- d. Dr. Montgomery holds monthly one-on-one meetings with Shared Governance Leaders from Faculty Senate, WSA and GSA to gain their perspectives on current matters.
- e. In spring 2021 the President began an annual Joint Cabinet Meeting between WSA and President's Cabinet.
- f. President Montgomery created and hosts the yearly traditional event called Staff Bash to honor employees and their efforts toward advancing our mission.
- g. As of the spring 2022 semester, the president has begun holding office hours, to connect with members of the University on topics of their choosing.

#### 4. **COVID-19 Response**

The pandemic posed a legitimate imminent threat to the University, as it did for all of higher education. The administration has had to manage issues of public safety, uncertain state funding and enrollment, and engage in expeditious problem solving to continue basic operations and deliver the University's core mission.

- a. With public health guidance, Western has implemented a multilayered strategy to promote safety on campus and continue campus operations as near-normal as possible. The administration's goal is to balance safety precautions with the mental health and academic needs of our students. The University has



implemented innumerable operational changes that have evolved with public health understanding and the course of the disease. These changes extend to the unit level, as each department was required to develop and file a safety protocol for their circumstance. Each plan was reviewed and approved, providing additional safety guidance as needed.

- b. WMU moved quickly early in the crisis when governments ordered shutdowns that put 20 million people out of work, leading to a 9% decline in GDP. To have not acted would have risked both the health and safety of the campus and the financial viability of the University. The freezing of expenditures late in the 19-20 fiscal year addressed immediate issues of cash on hand due to an economy that was coming to a halt. The budget cuts in 20-21 were necessary because the administration knew that the crisis would have both short term and lasting impacts on the University's enrollment and operations. These decisions were made in an environment of great uncertainty due to constantly evolving information, policies and guidelines. There was no way to know in advance what ultimately would become of state or federal funding. While people can argue about the availability and use of reserves, there is no disputing the fact that the pandemic led to a \$45 million loss of tuition due to its impact on enrollment and class modalities. These figures do not include the millions in lost revenue for our dining and residence halls, auxiliaries and athletics.
  - i. The University has sought to accommodate the needs of employees as feasible. It created extended COVID-19 leave to employees, investing \$6.7 million to cushion the impact of state-mandated shutdowns. It froze travel and postponed construction to help protect and support WMU employees.
  - ii. Despite losses in revenue, as a student-first University, WMU was one of only three Michigan public universities that did not raise tuition, room or board rates for the 2020-21 academic year.
  - iii. WMU's COVID-19 response track record is strong. WMU has established consistently low positivity rates—remaining below 3% for most of the fall 2021 semester and consistently lower than our surrounding community—along with vaccination rates that were much higher than our surrounding community and state.
    1. As of Jan. 18, 2022, WMU's positivity rate is 11.9%, about two and a half times of our surrounding community of 29.7%
    2. As of Jan. 18, 2022, WMU's vaccination rate (not including boosters to provide for accurate comparison) stands at 81.4%, well above the surrounding community's rate, which stands at 64.1%
    3. The University knows of no reported cases of COVID-19 attributable to classroom contact during the 2020-21 academic year.
  - iv. The administration has continually listened to the campus community as it adjusted procedures and protocols with changes in the pandemic's course. It has regularly heard from bargaining units and received

communications from APA and PSSO. Faculty were engaged in the University's response through the Provost's Fall Contingency Planning Task Force. While some requests from different groups were at times aligned and other times diverged, the President and Cabinet included their perspectives in decision-making, even when a different path was chosen.

- v. The University community has been apprised regarding COVID-19 on a regular basis with a case and vaccine dashboard, a website, which was redesigned for the 2021-22 academic year, email communications and social media posts. Town halls were held early in the pandemic to inform the campus and Kalamazoo community partners as well.
- vi. The COVID-19 Response Coordination Team has maintained ongoing and collaborative contact with the Kalamazoo County Health and Community Services Department and the Michigan Department of Health and Human Services, and has consistently followed their guidance and affirmation of the University's safety plans.

## 5. Securing Resources

One of the key roles of a President is to help the University secure resources so that it can better accomplish its mission. This work of diversifying our revenues has been among President Montgomery's top priorities. A comprehensive review of the President's record would be incomplete without noting progress in philanthropic and external funding endeavors.

- a. The University has launched its first comprehensive fundraising campaign since 2003—nearly two decades—with a working goal of \$1.25 billion.
- b. We received the largest gift for any public University in U.S. history. At \$550 million, the Empowering Futures Gift is bigger than any secured by any other President of WMU, or by any university or organization of any kind in Michigan and is the biggest ever received by a public university in the U.S.
- c. Even if we discount the component going to the Western Michigan University Homer Stryker M.S. School of Medicine, the campus received a record \$250 million. This would still be by far the biggest gift WMU has ever received and would be bigger than any gift ever given to a university in Michigan.
- d. The gift itself is a manifestation of the President's focus on diversifying Western's resources and the donors' confidence in the course of the University.
- e. Philanthropy is not the only area in which we have had success enhancing our resources. The University has secured over \$68 million in facilities and special project funding from the state of Michigan in the last four years.
- f. Thanks to the efforts of the faculty, the University secured \$36.6 million in external awards for sponsored projects in the 2021 fiscal year. This year the campus received its largest grant from the U.S. Department of Education at \$29.5 million.

## APPENDIX

### Divisional Actions in Response to Employee Engagement Survey As of March, 2021

#### President's Cabinet

##### Communication

- Virtual Western Future Focus Series as a reimagining of the State of the University Address
- Town Hall opportunities to engage with President Montgomery and members of the cabinet
- Newsletters created for Business and Community Leaders
- Joint cabinet meetings between WSA and the President's Cabinet
- EverFi Training modules
- Campus Climate Survey – report data expected by March 19
- Emphasis on showing gratitude and thanks
- Reinvigorate Community Conversations with President Montgomery in virtual format

##### Collaboration

- Multiple cross-division working groups established and sunset when needed including Building Hibernation and Reopening; COVID-19 Response Coordination Team; Operations; Schedule Planning; Commencement Planning; Fall Contingency Planning

##### Engagement of Senior Leadership

- Anti-Bullying Policy
- Telecommuting Policy
- Provide additional COVID-19 Leave Bank to preserve annual/sick leave banks;
- Clifton Strengths team-based training and individual coaching sessions
- Diversity, Equity and Inclusion Team training, retreats, common read and small working group sessions
- Established Racial Justice Advisory Committee (RJAC) and subcommittee groups to generate recommendations/proposals for funding consideration related to eliminating systemic racism and racial/social justice
- President's Cabinet "Road Show" with meetings in alternating locations on campus – prior to COVID-19 related closures
- Cabinet members working within their divisions to share and address findings from the Employee Engagement Survey data by incorporating target areas to enhance or strengthen. Samples of division reports follow

## Academic Affairs

### Overview

Deans, chairs and directors were first introduced to the employee engagement results for academic affairs during Academic Forum on Wednesday, Sept. 25. Many of the data, disaggregated by unit, were shared and discussed with academic affairs administrators during the next Academic Forum meeting (in October). The October meeting provided an opportunity for the full leadership team to work with their unit colleagues to begin recognizing key concerns and developing short- and long-term strategies for addressing those concerns. Progress reports were shared at a Jan. 22 forum meeting, and many ideas were enhanced through the sharing of successful implementation strategies.

Several Provost's Council meetings that have taken place over the last several months also featured discussions and updates among deans and associate deans.

### Division-Level Themes

During academic leadership meetings and unit-level input sessions, many new initiatives have been—and continue to be—developed; the following key themes have emerged from the unit-level work: communication/transparency, recognition, performance management and professional development.

The Provost's Office rebuilt our website in response to employee engagement results to begin developing trust, a sense of partnership and shared responsibility for decision-making. To do this, we focused initially on achieving three key objectives: (1) Increase transparency and communication of critical meetings and decisions, (2) Create opportunities for recognition and to share good news across the division and (3) Begin to establish a culture of celebration.

A sample of the unit-level strategies is highlighted below:

- Communication and Transparency:
  - College of Health and Human Services: (a) Created a weekly Dean's office reports/updates and calendars for recruitment needs and other college events to our constituents. (b) Diversity and Inclusion Committee is creating transparent and inclusive communication recommendations. (c) Created the CHHS Activities Team (CAT) to provide opportunities for engagement between all employee groups and across schools, departments, and units. Held the first two-events in Dec. 2019.
  - Office of Information Technology: Created a culture and engagement team across the division to understand communication issues and create activities to bring the teams together.

## Recognition

- College of Aviation (a) Quarterly lunches are held to celebrate flight hour goal accomplishments. (b) Staff and faculty may recommend aviation constituents for a Dean's Award. If approved, a certificate is presented that allows recipients to choose a swag item from the aviation Spirit Shop.
- College of Engineering and Applied Sciences: Created a set of awards for staff, RSO advisors and faculty, voted on by students.

## Performance Management

- College of Arts and Sciences: Dean's Office sponsored experts on conflict management to work with chairs and directors, and I have sent new chairs to training sessions to develop their management skills. The most recent big initiative on this issue will be to take a team to the NCPRE Confronting Challenges in Academic Units meeting this March. Both of these efforts are co-sponsored (supported by) funding from the Provost's Office.
- EUP: Created a team of mid-level managers that is creating additional processes for performance management that extend the formal HR requirements. This group will make recommendations to the senior-leadership in spring 2020.
- Graduate College: Using the HR Performance Management Program, Interim Dean Byrd-Jacobs met with each team member to set objectives and competencies to better perform year-end reviews (reviews had not been done in some time and the objectives/competencies setting phase had never been used). This was a good opportunity to connect with each of them and hear about their challenges and how they plan to work on process improvement.

## Professional Development

- College of Fine Arts: Designated a professional development fund in the dean's office to support staff Professional Development and formed a six-person staff task force to address staff concerns and develop a procedure to apply for and review the funding.
- Haworth College of Business: Intentionally add staff members to important committees within the college to allow both faculty and staff to have an impact on decision-making on important issues.
- University Libraries: Sponsoring an employee professional development opportunity ("5 Languages of Appreciation in the Workplace") in March 2020.

## Business and Finance

### Communication

- Vice President for Business and Finance and Dr. Warren Hills meet quarterly with leadership from POA and AFSCME
- Vice President for Business and Finance meets quarterly with MSEA leadership
- Vice President for Business and Finance and Dr. Warren Hills meet monthly with APA and PSSO leadership
- Two one-hour training sessions in positive communications are scheduled with Facilities Management leadership and AFSCME leadership
- The Provost and Vice President for Business and Finance hosted a general campus town hall and met with leadership for each operational unit as well as WMU-AAUP to discuss the financial impact of COVID-19 on 2019-20 operations and the potential impact on the 2020-21 budget

### Collaboration

- The Provost, Vice President for MarCom, Vice President for Student Affairs and Vice President for Business and Finance have developed an RFP for a tuition rate structure study and market comparison. The RFP should be issued no later than next week.
- A working committee led by Dr. Warren Hills with members from Advancement, Office of Information and Technology, and the Office of Research and Innovation are evaluating the process used when an employee separates from WMU – including necessary communications to direct inquiring individuals to the new source of information/service.
- Many members of business and finance worked with others from across the University to prepare the HLC report which assesses us against specified key criteria.
- Scheduled meetings are occurring between leadership of accounts receivable and student financial aid with the goal of better coordination of effort and communication to improve service to students and their families.
- The entire planning and operational response over the past year to COVID-19 has involved all key divisions of WMU. Specific examples include:
  - The registrar (AA) provides classroom usage information to custodial services (OBF) so that classrooms are cleaned in between courses if there is a 15-minute or more window of no use.
  - Sindecuse (SA) reports active cases of COVID-19 to Facilities Management (OBF) so that the spaces can be appropriately cleaned.
  - Housing staff (SA) identify spaces occupied by students who are either quarantined or isolated so that maintenance personnel (OBF) safely access the space to make needed repairs.
  - Several members of Facilities Management are actively engaged in the newly constituted carbon neutrality committee which includes representatives from across campus with many faculty members included.
  - The entire SRM project has been built upon collaboration and communication. Working groups were composed of members from each division and they determined the

structural framework for the new budget model, with final review and approval by the steering committee (president's cabinet). Town halls and newsletters have continued to keep campus informed of progress.

### **Engagement/Senior Leadership**

- Prior to COVID, the president's cabinet was meeting in different facilities around campus and meeting with the faculty and staff of that unit before and after the cabinet meeting.
- Conducted many town halls throughout the past years to update campus on COVID and operational issues and be available for Q&A.
- Frequent communications from the President via email and video.

### **Diversity and Inclusion**

#### **Communication**

- Provide in Teams and monthly ODI leadership meetings and quarterly ODI meetings campus updates.

#### **Collaboration**

- ODI Leadership Team playing active role in decision-making, for example this team worked to determine our layoffs and cuts.
- Kalamazoo Promise Scholars Program and Mentoring for Success working collaboratively to share mentors to help with the institutionalization of Mentoring for Success which is a grant-funded program.
- ODI working with Lewis Walker Institute as well as Government Affairs to bring speakers to campus.

### **Engagement/Senior Leadership**

- Racial Justice Advisory Committee has brought senior leadership in direct engagement with faculty, staff and students to collaboratively address campus issues.
- Communities in Collaboration panels hosted this summer between ODI/WSA and KVCC.

### **Government Relations**

- Corporate Engagement: Collaboration with almost every VP area focused on building better systems and structures for partnerships.
- We Talk: A collaboration with students, faculty and staff to offer programs during the pandemic involving WSA, Faculty Senate, APA/PSSO and AAUP.

## **Intercollegiate Athletics**

- The Leadership Team of Intercollegiate Athletics took several meetings to discuss the University Employee Engagement Survey. We then engaged discussion with our coaching staff and administrative team and established collaboration with several different units within and outside of our Division.

## **Collaborations and Engagement**

- The entire Division committed to an aggressive Diversity and Inclusion program for student-athletes and all staff. Looking forward to advancing this goal and making a commitment to provide an environment recognized as one of the premier in the country.
- Bronco Athletic Fund transition with the Foundation to enhance revenue streams. This includes all aspects of fundraising and game management planning working with 10 different departments on campus.
- Team membership on all new University committees. Relationships with My Senior Leadership Team were enhanced and trust and commitment to student success was established through these relationships.
- University commitment to enhance institutional atmosphere and morale through our school spirit events and involvement with enrollment management, alumni relations, student life and branding.

## **Budget Structure**

- The Department worked diligently with each sport and division to evaluate how we were going to balance the budget while reducing \$6.5 million.
- Each sport was involved in the department planning while we also took on 2 new large facilities in the Pool and Ice Arena.
- HEROS Program training with individual sports / Covid University Team and Covid testing with Sindecuse Health Center
- Individual teams took personal training with Sindecuse Health Center for sexual assault training to become leaders on campus for prevention.
- Relationship that was cherished with Sindecuse Health Center to provide safe and ethical testing for Covid with all 375 student athletes and 50 Staff.

## **Marketing and Strategic Communications**

- We have cross functional teams that bring subject matter experts together to work on common projects and goals.
- Implemented new project management processes and applications that allow for full visibility across the division. This situational awareness contributes to team cohesion.
- Throughout the COVID-19 crisis we have maintained regular full-division meetings every three weeks. These meetings are informal and begin with items that teams want to discuss. As a



result, the team feels more connected and aware of what is happening across the division and University.

- Each divisional team has a high level of engagement, some meeting (briefly) as much as every morning.
- Approaching the one-year mark of the COVID-19 crisis we did a “start, stop, and continue” exercise to re-examine our team engagement. This led to keeping what was best in our meetings and eliminating items that had served their purpose.
- We are building our team culture and general as well as our cultural competence at the same time. Over the fall, we had a division-wide book group based on *How to Be an Anti-Racist*. For summer we are planning ERACCE training.

## **Research and Innovation**

In response to the Employee Engagement Survey, the Office of Research and Innovation (ORI) held a retreat and developed 3 working groups to work on the 3 targeted areas: **Communications** (which links to the umbrella areas), **Professional Development** and **Progress Review**.

### **Communications**

The team put forth a recommendation for a standardized procedure on email/voicemail notifications for employees that have separated from the University. From this recommendation HR has assembled a working group to begin discussing the new standardized procedure. Within ORI the team has made changes to the ORI monthly newsletter to make it more user friendly for readers. At the beginning of the newsletter now will be direct links to the different topic areas and a section for important and time sensitive news. We are continuing to work on a form to submit concerns to ORI leadership that will be anonymous.

### **Professional Development**

Created opportunities for ORI employees to improve and build on their professional knowledge, skills, and job effectiveness. During this challenging time of COVID-19 and budget constraints, we have had to be creative in finding opportunities. We have had staff share their skills to train coworkers. We have found free or low-cost virtual conferences and training. We have also worked with the performance review committee to promote a Clifton Strengths program for the entire office.

### **Progress Review**

The team worked on implementation of HR’s recommended practices via training from HR on how to complete reviews and the creation of a checklist on what needs to be done and tips on how to do it. ORI has reframed performance reviews as progress reviews to encourage an environment of growth and improvement. They also created a Professional Development Plan Template for staff to complete; with hopes relevant content can be incorporated into staff annual goals to promote staff growth and satisfaction.

## Student Affairs

In response to the Employee Engagement Survey, Student Affairs conducted two town hall meetings where we shared the results of the survey and brainstormed initiatives we could take to address the concerns that were raised. The two areas that we decided deserved focused attention were **communication** and **recognition**.

As a result, we decided to bring back a division-wide newsletter that we would publish twice a month. This newsletter would provide updates as well as recognize employees who are going above and beyond. Due to Covid, we have not made much progress on either of these fronts but the plan is to resume these activities once we are able to return to a more normal state.

Tony, Candy, Kathy, and I took the lead with the cross-divisional collaboration initiative. Again, we had great town halls where lots of ideas were generated. Once we return to campus, the next step is to revisit those ideas and determine next steps.