



**Board of Trustees Meeting
January 16, 2019**

Appendix A

Supplemental Documents

- 1) [PERS Reform Presentation](#)
- 2) [Doctor of Physical Therapy Presentation](#)
- 3) [Doctor of Physical Therapy Proposal](#)
- 4) [BA in Interpreting Studies: Theory Proposal](#)
- 5) [Budget Manager Presentation to Tuition & Fee Advisory Committee](#)

New Approaches to PERS Reform

- ✓ Need for Reform: New Data
- ✓ Impacts on Services: Spotlight on Education
- ✓ Views of Public Employees & Oregon Voters
- ✓ Framework for a Comprehensive Solution

Sources

Data

December 2018 Milliman Report to PERS Board

October 2018 Milliman Report to PERS Board

September 2018 “PERS by the Numbers”

September 2018 State Economic and Revenue Forecast

August 2018 Milliman Report to PERS Board

Opinion Research

DHM Research: Focus groups of state and local government employees (8/21/18 & 8/25/18)

Public Opinion Strategies statewide survey of 600 registered voters (10/4-10/7/18)

Terminology (related to benefits)

Pension refers to the defined benefit retirement plan established by PERS in 1967 and amended to incorporate different benefit levels since then.

“Tier 1/2” refers to the higher pension benefit levels applicable to employees hired on or before August 28, 2003.

Oregon Public Service Retirement Plan (OPSRP) refers to the pension benefit levels applicable to employees hired after August 28, 2003

Individual Account Program (IAP) is a defined contribution plan, separate from the pension plan added to the PERS retirement system as of January 1, 2004 for all employees regardless of date of hire..

Terminology (related to funding)

Unfunded Actuarial Liability (UAL) is the amount by which PERS funds are projected to fall short of paying for all benefits earned by active and retired members of the system.

Payroll Rates are contribution rates paid by employers as a percentage of payroll to finance PERS retirement benefits. **“Base rates”** refer to the rates PERS charges for pension benefits, before offsets for side accounts and other adjustments. **“Net Rates”** refer to the rates PERS charges for pension benefits, after adjustments and offsets for side accounts created by employers’ pension obligation bonds. “Net rates” ignore the costs of debt service for these bonds. Accounting for bond costs, “net rates” average one percent of payroll less than “base rates.”

“Pick up” refers to the practice by which employers agree to pick up the required employee contributions for the pension plans (prior to 2004) or the IAP (since 2004) as part of employees’ pay packages. The “pick up” exempts this portion of pay (6%) from federal and state income taxes paid by employees and FICA paid by employers and employees.

Scope of the Problem

PERS Unfunded Liability = \$22.3 billion

\$13,369

per

Oregon Household

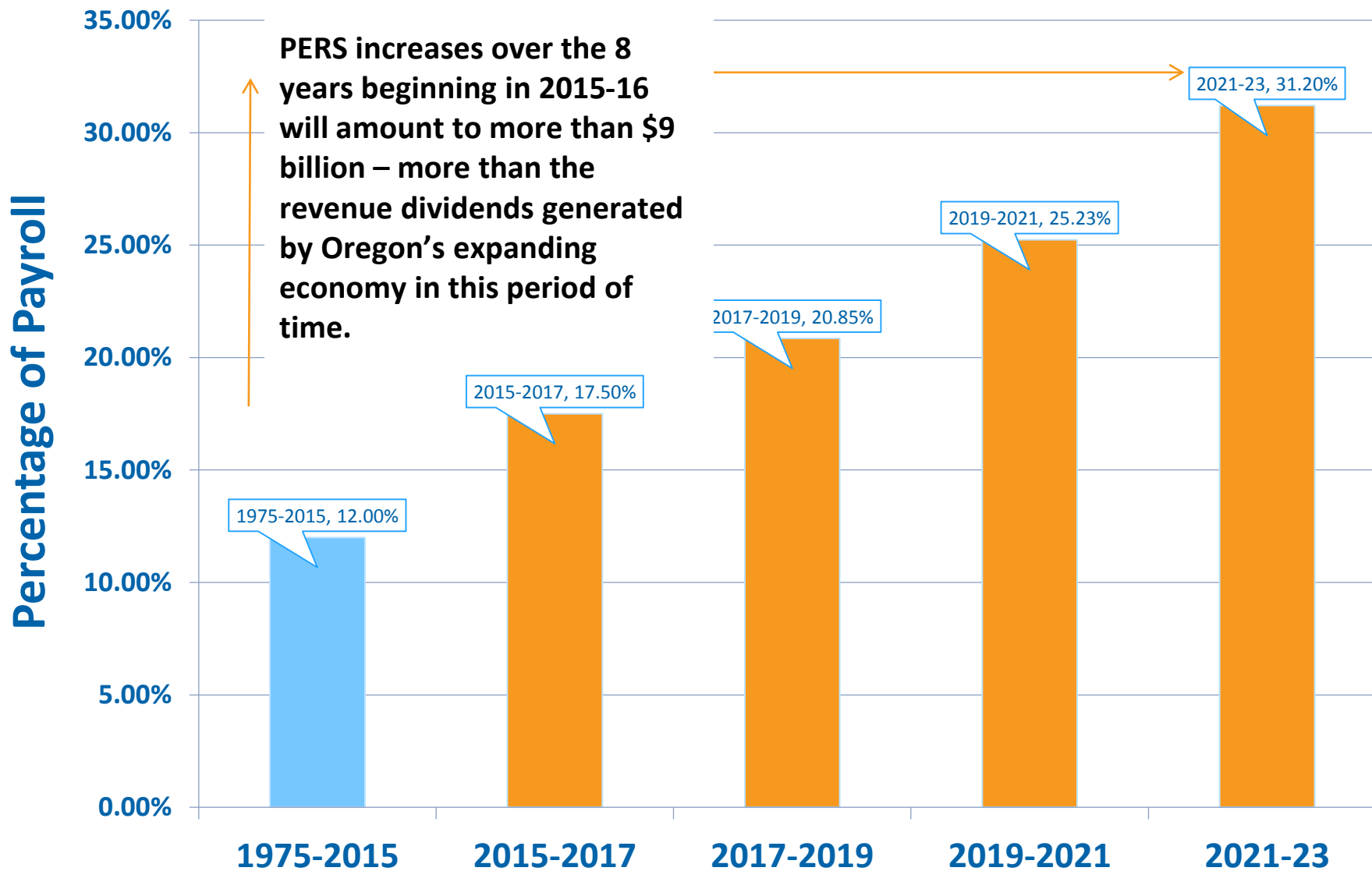
\$128,900

for every

Public Employee

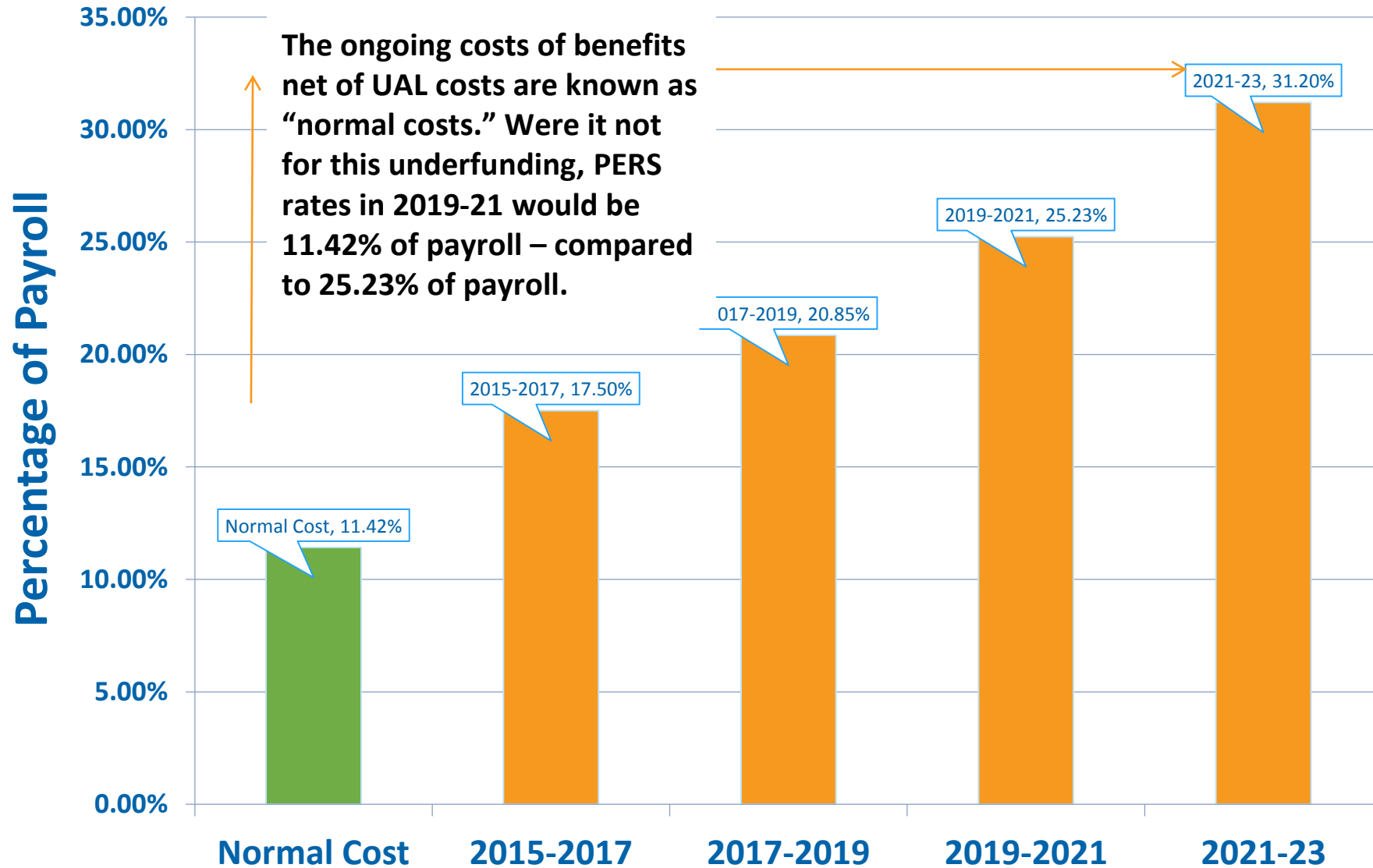
Past, Current & Projected PERS Employer Rates

(Base rates, excluding side accounts and IAP; rates beyond 2019-21 to be Updated in December 2018)



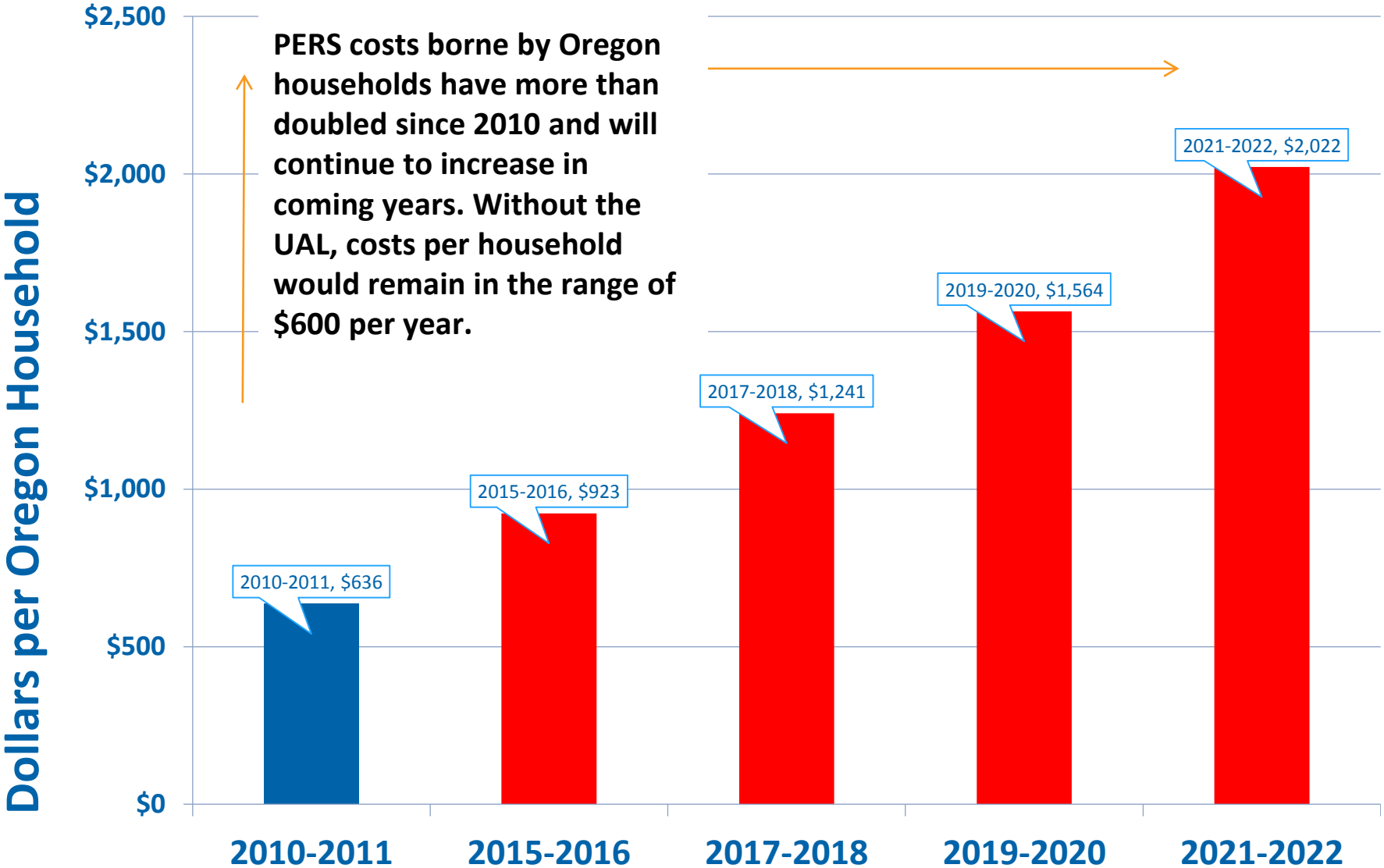
PERS Employer Rates Driven by UAL

(Base rates, excluding side accounts and IAP; rates beyond 2019-21 to be Updated in December 2018)



PERS Costs Borne by Oregon Households

(System-wide annual payroll costs divided by the number of Oregon households in each of the cited years)



PERS Costs: An Expensive 8 Years

Total projected INCREASE above 2017-18 over the following 8 years:



an additional ~\$10.2 Billion

K12 Schools

~\$3.3 Billion

State/Universities

~\$3.0 Billion

Cities/Counties/CCs/Other

~\$3.9 Billion

These are funds that will be diverted from budgets and services.

Impacts of PERS Costs: K12



- **Each 1% of payroll in K12 = \$66 million in 2017-19, rising to \$71 million in 2019-21**

By 2023, the share of increased PERS costs borne by school districts will amount to what it costs to pay for:



5,000 teachers or



18 days of school

Takeaways

- ✓ Impact on taxpayers
- ✓ Claims on budgets and effects on services
- ✓ Barrier to a better future

“In a strong economy, we should be getting ahead, not falling behind.”

Causes of the Problem

How PERS Defines Its Retirement Goals

The goal of the PERS system is to provide an adequate lifetime benefit after a career of public employment, which has been defined as:

50% of final average salary after 30 years + Social Security = 75 to 85%.

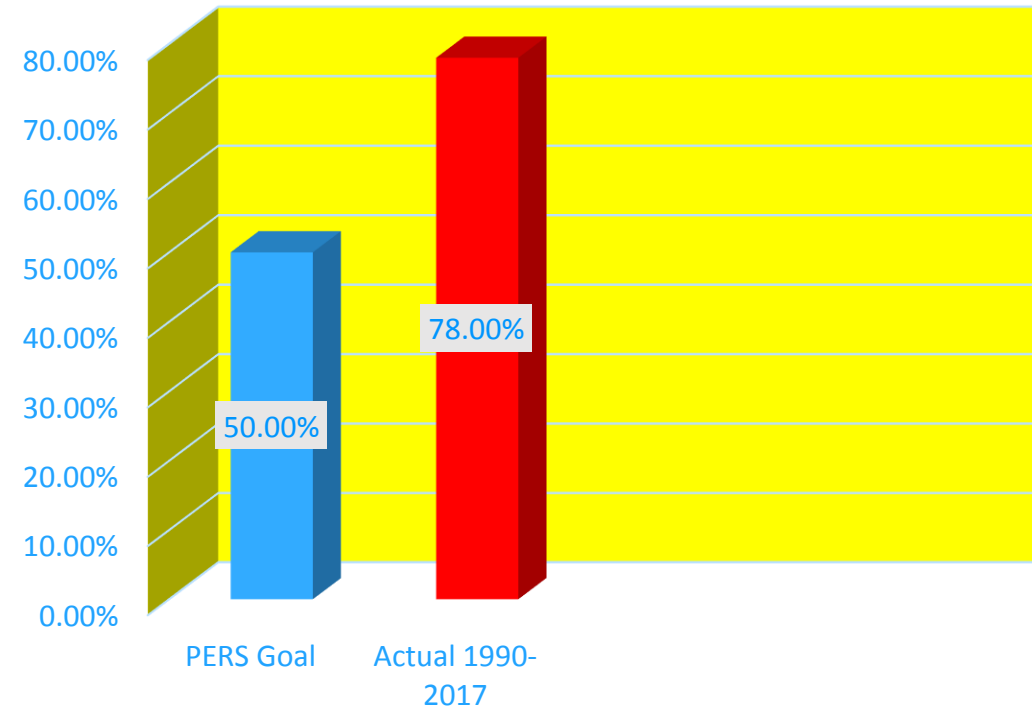
“In 1981...the PERS actuary advised legislators...that the Full Formula Benefit, when combined with Social Security Benefits, would provide 75 to 85 percent of preretirement income for career employees...The formula provides 50 percent of final average salary for career employees...”

--
*Special Master's Written Report and Recommended Findings of Fact
Hon. Judge David Brewer, April 8, 2004*

Excesses of the system

- PERS payouts have far exceeded the system's goal
- Career employees' pensions have averaged 78% of final average salary since 1990
- More than half of all retirees since 1997 have received benefits about the pension formula (Money Match)

Average Initial Pension Benefits as % of FAS for 30-Year Employees



The Money Match problem

- **Money Match payouts (for Tier 1 and 2) are responsible for the lion's share of the PERS UAL**
 - **Better than the years-of-service formula**
 - **Annuitized at overly generous rates**
- **Money Match payouts continue to represent a sizable portion of retirements (43% in 2017)**
- **Tier 1 and 2 employees with access to Money Match constitute 34% of the current workforce, slightly higher among K-12 employees**

But Money Match isn't the only problem

- ✓ The Tier 1 salary base for the pension formula remains unlimited, while pensionable salaries for Tier 2 and OPSRP are capped at \$275,000/year
- ✓ The use of unused sick leave and vacation in Tier 1 and 2 inflate final average salaries
- ✓ Even OPSRP benefits exceed the system's goal for career employees, now that the pension plan is supplemented with the Individual Account program

A Tale of Two Retirement Plans

“Bare Bones” Tier 1 & 2

(w/o Money Match, or Sick Leave/Vacation)

Formula = 50% of FAS at 30 years

IAP = 6-9% of FAS at 15 yrs

Combined = 56-59% of FAS

OPSRP

Formula = 45% of FAS at 30 years

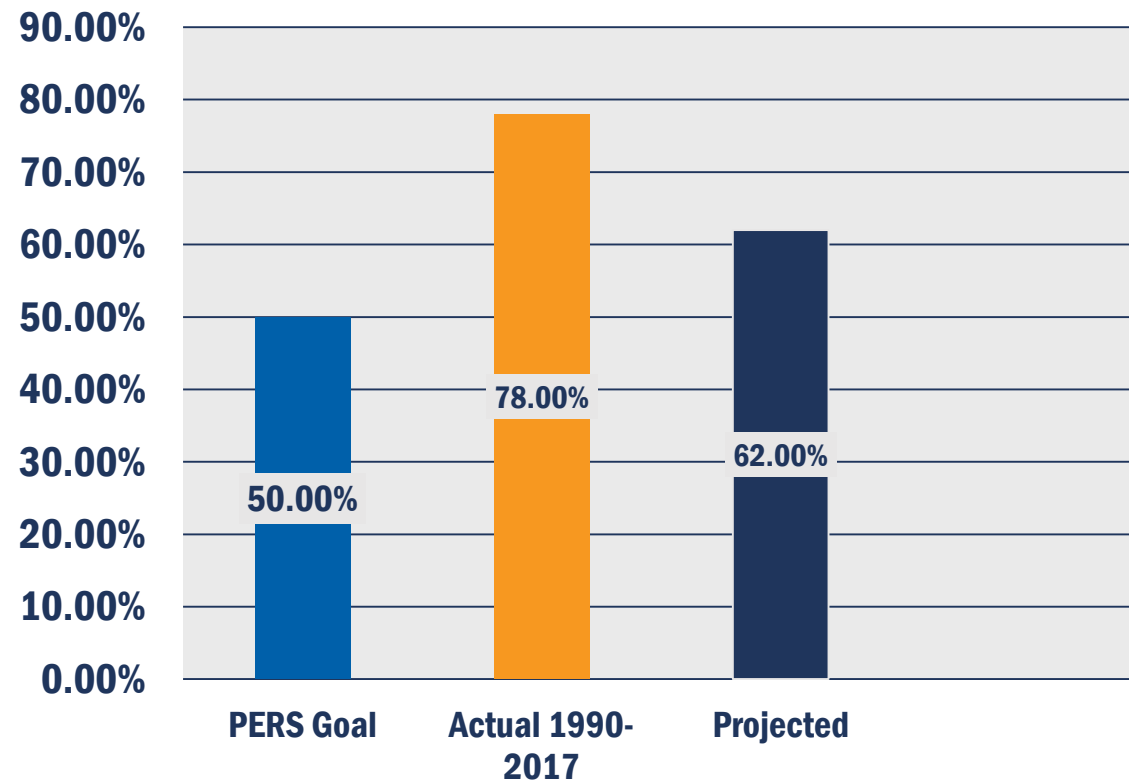
IAP = 13-19% of salary at 30 yrs

Combined = 58-64% of FAS

Payouts continue to overshoot PERS target

- PERS goal is 50% of final average salary after 30 years
- Average for 30-year retirements since 1990 has been 78%
- Projections going forward (OPSRP + IAP) indicate >60%

Average Initial Retirement Benefits as % of FAS for 30-Year Employees



What Can Be Done

LEGAL: Moro decision clarifies what can be done

In *Moro v. Oregon* (2015), the Supreme Court changed its minds about what changes can be made to the system:

- Keep the promise for benefits earned to date, but:
- Changes may be made going forward:
 - Benefits to be earned in the future are (with limited exceptions) modifiable
 - Employee contributions may be established for pension benefits going forward (See also, *Strunk v. PERB*, 2005)
- Note: In *Moro*, the Court reversed its earlier OSPOA decision and rejected the “California rule.”

How far can the *Moro* decision take us?

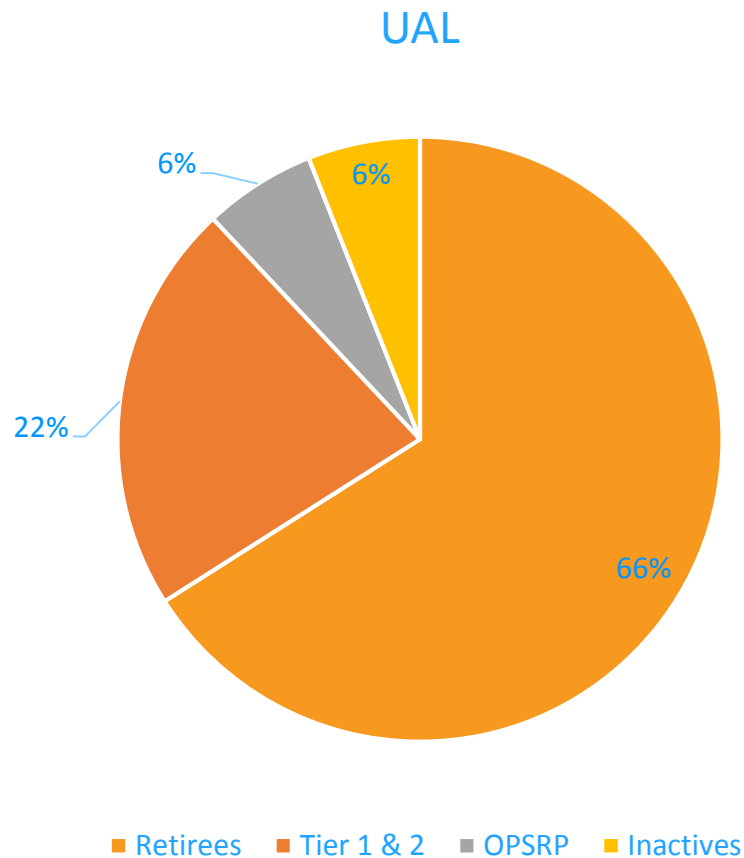
Legacy costs are baked in:

- Liabilities for those retired remain beyond the reach of benefit adjustments.
- Prior underfunding for current employees appear to remain beyond the reach of benefit adjustments.

But going forward costs can be reduced:

- But the ongoing costs of benefits accruing from now forward can be reduced via prospective benefit reductions or employee cost sharing

What can we reasonably expect from adjustments affecting current employees?



Here is a useful measure of fairness for cost reductions affecting current employees:

Underfunding for benefits accrued by active employees amounts to **\$6.4 billion of the \$22 billion UAL**

= 6 points of payroll

What do public employees think?

August 2018

- **Two focus groups with Tier 3 PERS members**
- Conducted August 21 and 25, 2018 in Portland and Salem
- Participants were either city/county employees (Portland group) or state employees (Salem group)



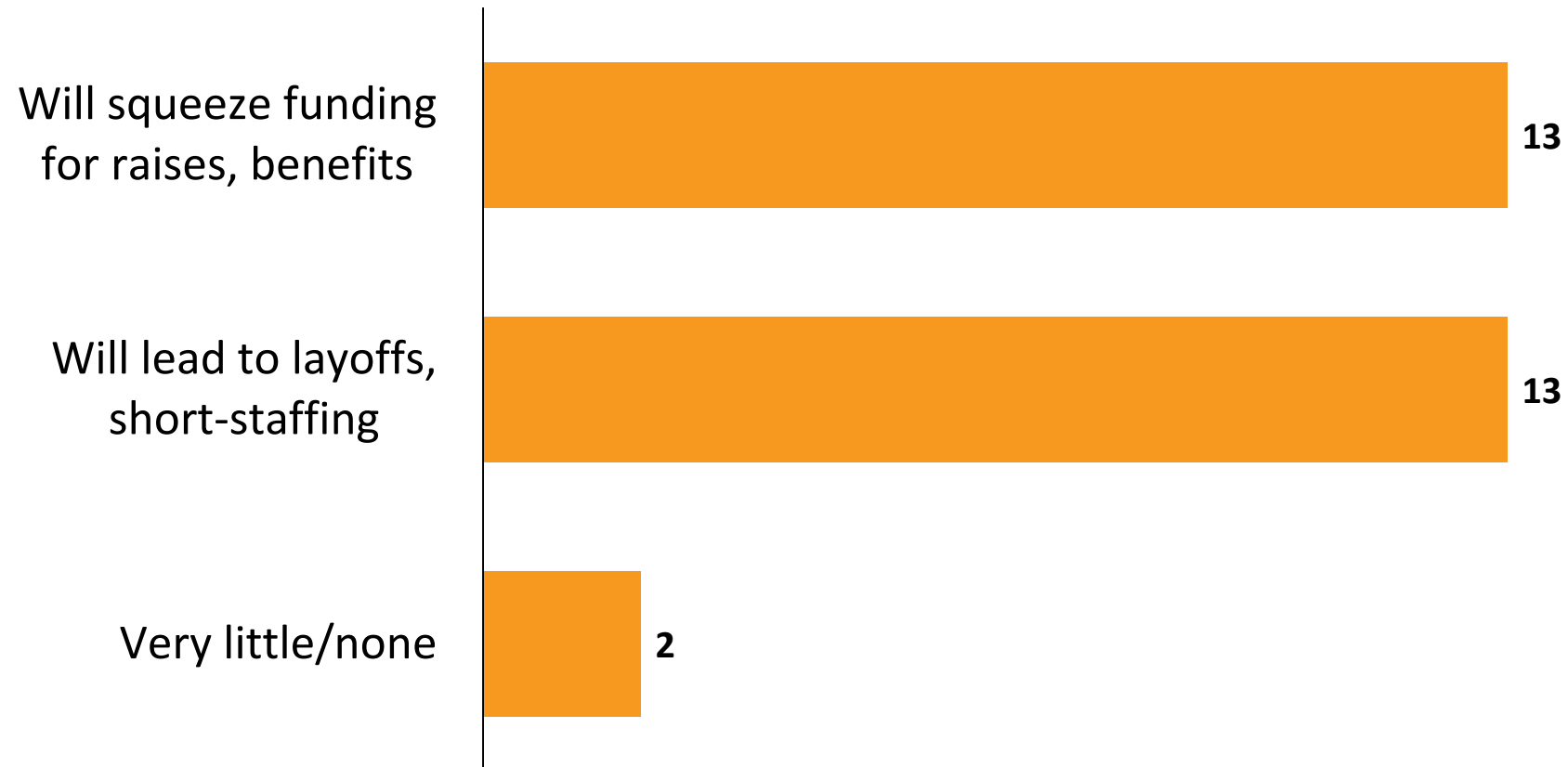
What public employees think about PERS



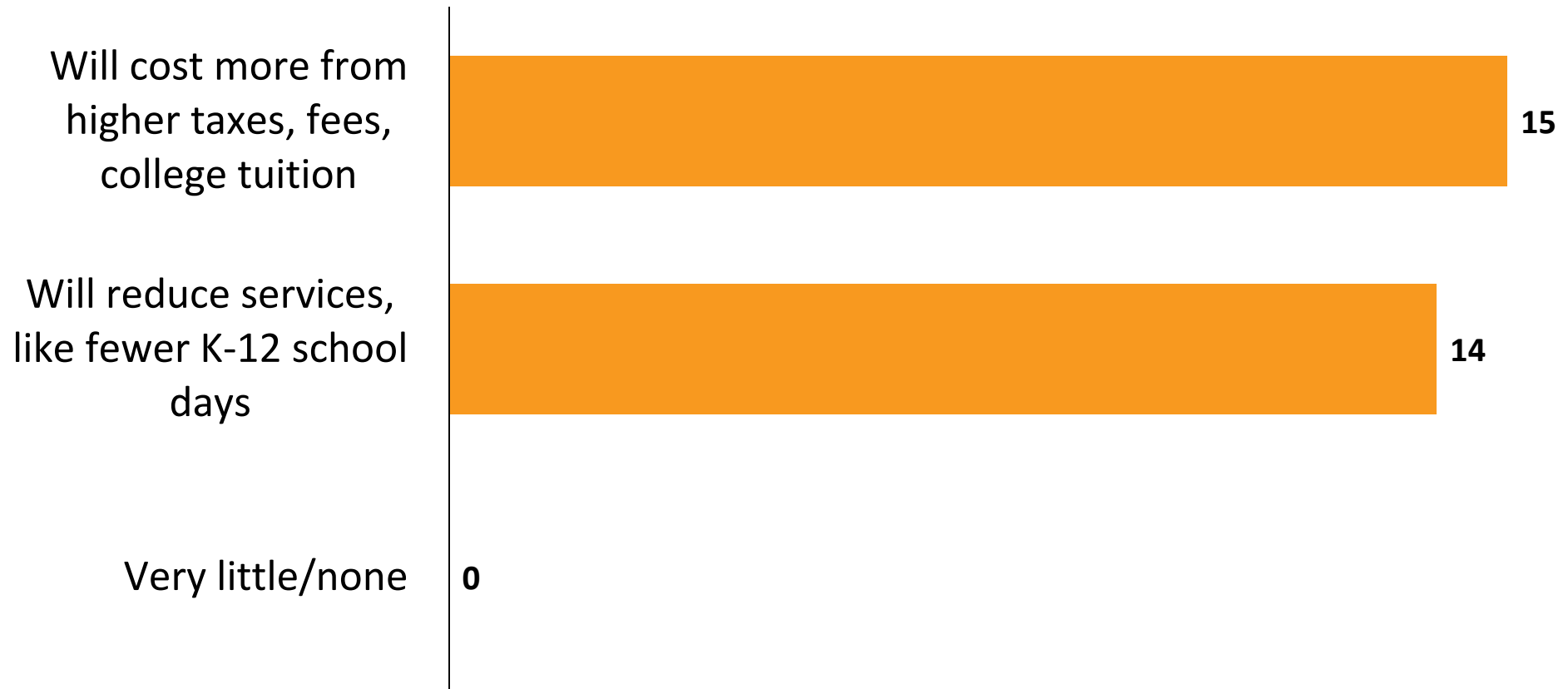
When presented with the cost projections, public employees express concerns about:

- **Impacts on their jobs**
- **Impacts on their families**

Impacts of PERS costs at work



Impacts of PERS costs at home



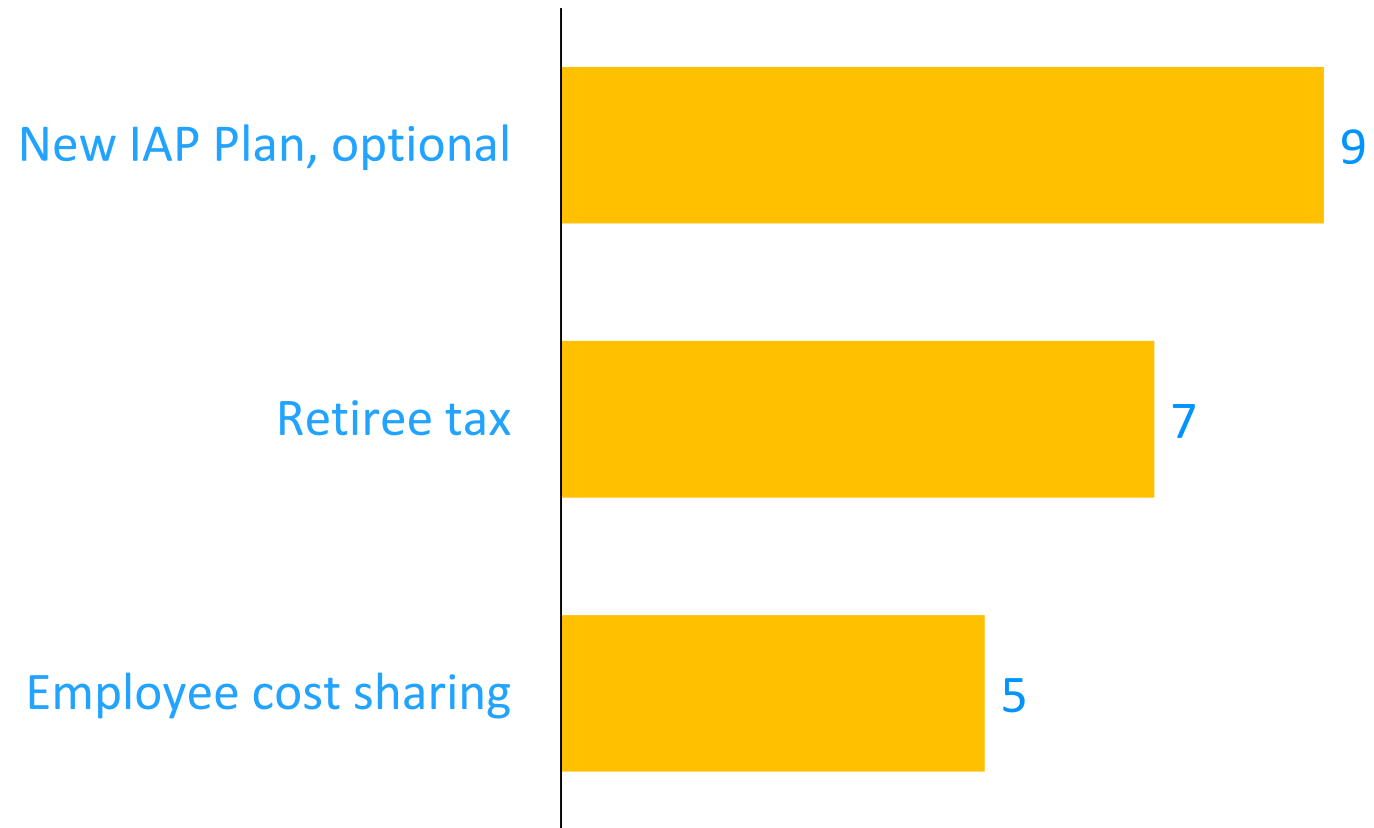
What public Ees think about PERS solutions



After a discussion of options for reform, public employees express interest in:

- More 401K-style options
- Employee choices
- Modest cost sharing
- Retiree tax

Most preferred reform options



What Oregon voters think about reform



Public Opinion Strategies Survey of 600 registered voters, Oct. 4-7, 2018, found:

- **Strong support for a defined contribution plan**
- **Strong support for employee cost sharing**

Approaches to Reform

Goals of Comprehensive PERS Reform

- ✓ Reduce the system's rising claims on budgets to preserve services.
- ✓ Do "more with more" with new revenues, whether from the growth of the economy or new taxes. Examples:
 - ❑ Add school days, reduce class sizes, raise starting salaries in K12
 - ❑ Moderate tuition increases, increase need-based financial aid in community colleges and universities
 - ❑ Enhance public health and safety (cities and counties)
- ✓ Manage remaining liabilities so as not to place an undue burden on next generation of Oregonians ("kids in today's classrooms")

Touchstones for Reform

- **Fair**: Honor benefits earned to date, but correct the excesses that have plagued the system. Ensure benefits are:
 - ❑ Fair and adequate for employees
 - ❑ Competitive for employers
 - ❑ Affordable for taxpayers
- **Legal**: Follow the path charted by the Oregon Supreme Court (*Moro v. Oregon*).
- **Flexible**: Provide employee choices to suit career plans
- **Better**: Savings used to preserve and improve services

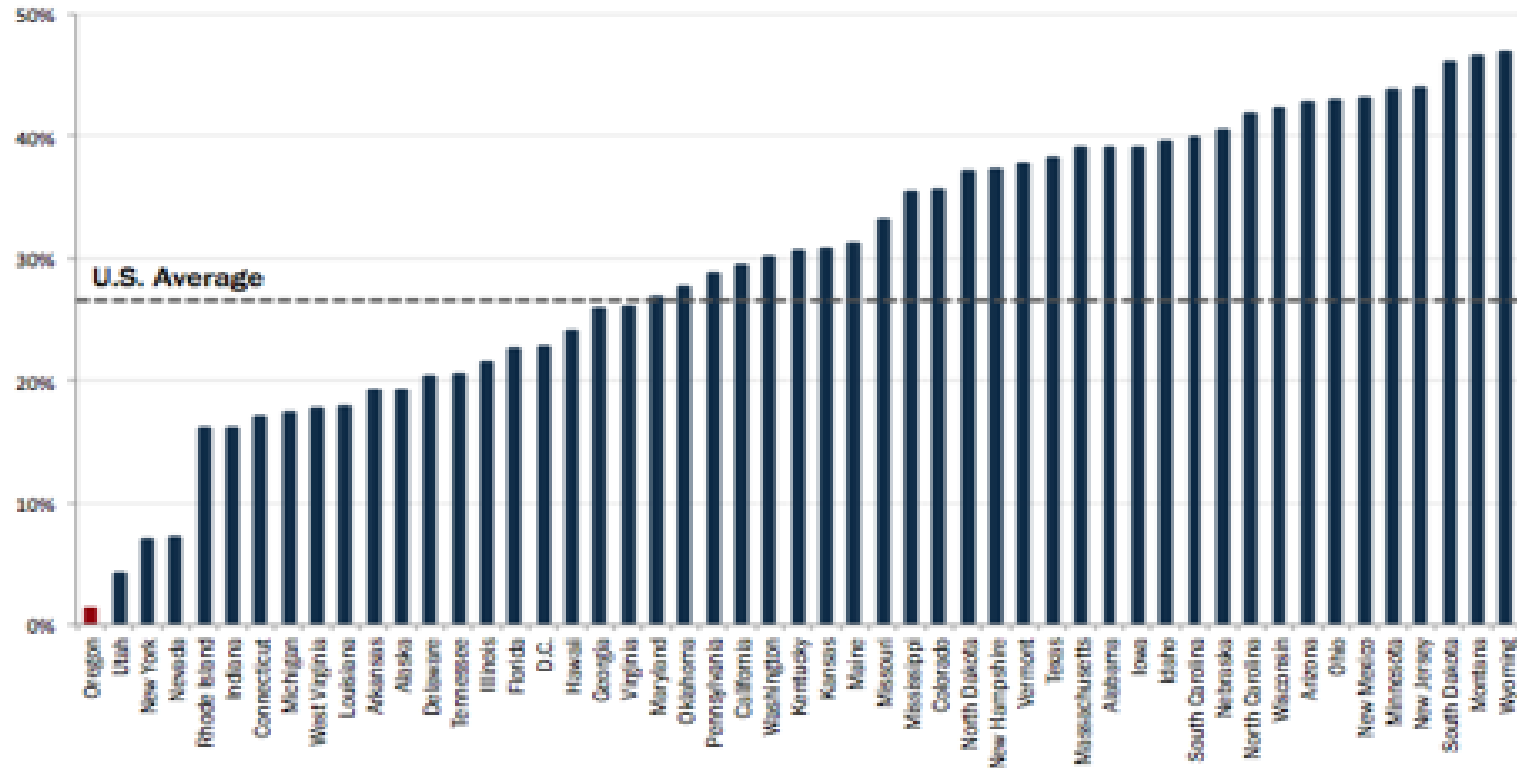
Possible Approaches to Reform

- ❑ Employee cost sharing
- ❑ Benefit rebalance, to align with post-2003 structure
- ❑ System rebalance
 - ❑ Pension plan or
 - ❑ Expanded IAP
 - ...but not both!
- ❑ Retiree “pay back” options
 - ❑ Working retirement/Pay Back plan
 - ❑ Retiree income tax surcharge

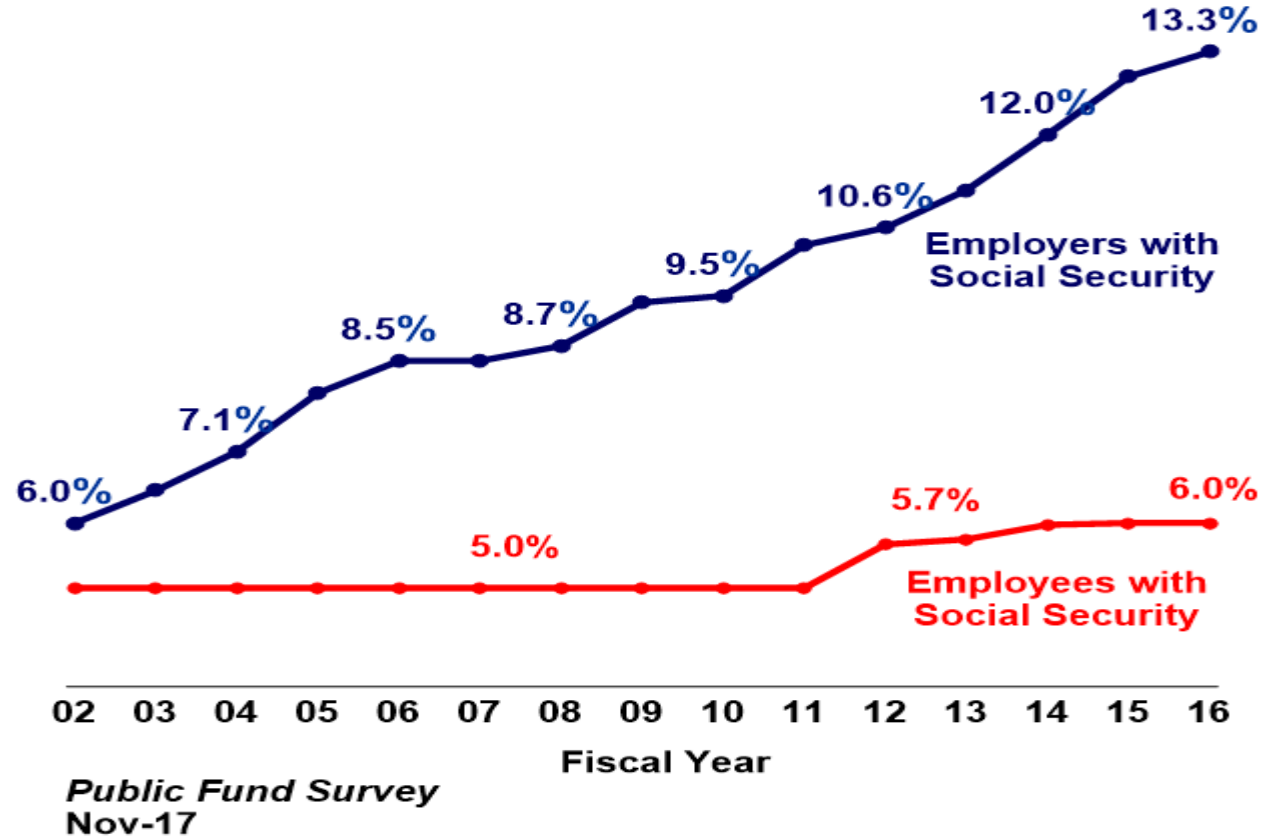
The Case for Employee Cost Sharing

Employee contributions: Oregon is an outlier

Employee Share of Contributions, State and Locally Administered Defined Benefit Pension Systems, FY 2014



Average Contribution Rates Across U.S. Defined Benefit Plans

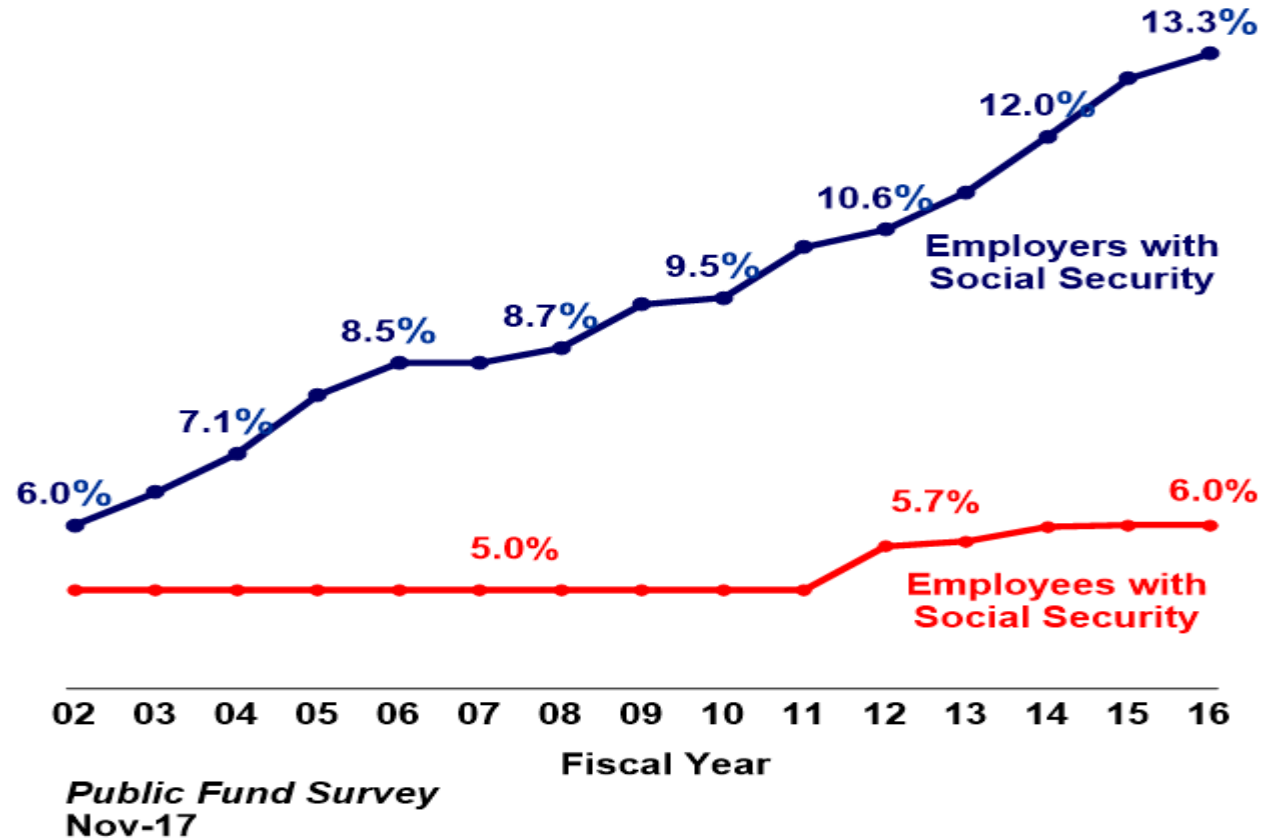


Nationally, in 2016:

- ❖ Employers paid 13.3% of payroll
- ❖ Employees paid 6.0% of payroll

Source: National Association of Retirement Administrators

Average Contribution Rates Across U.S. Defined Benefit Plans



In Oregon,

- ❖ Employers paid 17.5% on 2016-17
- ❖ Employers pay 20.85% now
- ❖ Employers will pay 25.23% next year
- ❖ Employees pay 0

What about the IAP and the 6% Pickup?

(Mis)Understanding the IAP (Individual Account Program)

PERS includes a mandatory supplemental retirement savings plan for all employees, known as the IAP, but...

- As a defined contribution plan, the IAP is always fully funded
- The IAP has no effect on the cost or funding of the pension plan
- But the IAP is relevant to the benefit calculation because it provides an additional retirement benefit over and above the pension benefit

(Mis)Understanding the IAP Pick Up

Almost two thirds of employees receive the 6% pickup for their IAP contributions (67% of payroll).

Employers treat it as part of their employee pay packages. Many employers have CBA language requiring an offsetting pay increase upon termination of the pick up.

The 6%, whether picked up or not, is not a cost driver. It's a fixed cost going forward.

Cost sharing and the IAP

Employee cost sharing can be coordinated with the IAP by:

- ✓ Allow the pickup to continue to cover employee contributions to the pension plan or new DC plan or
- Eliminate the IAP and the pickup or
- Making continuation to the IAP optional for employers (negotiable for bargaining units)

The Case for Rebalancing Benefits

Tier 1 & 2 Features Drive Costs

Tier 1 & 2 (General Service)

Formula = 1.67%/year = 50% of FAS at 30 years

Full benefits @ age 58 (Tier 1) or 60 (Tier 2) or 30 years of service

- + Money Match option
- + Sick Leave/Vacation option
- + Earlier retirement age

**Cost to Employers =
15.3% of payroll ongoing
+ UAL amortization**

OPSRP (General Service)

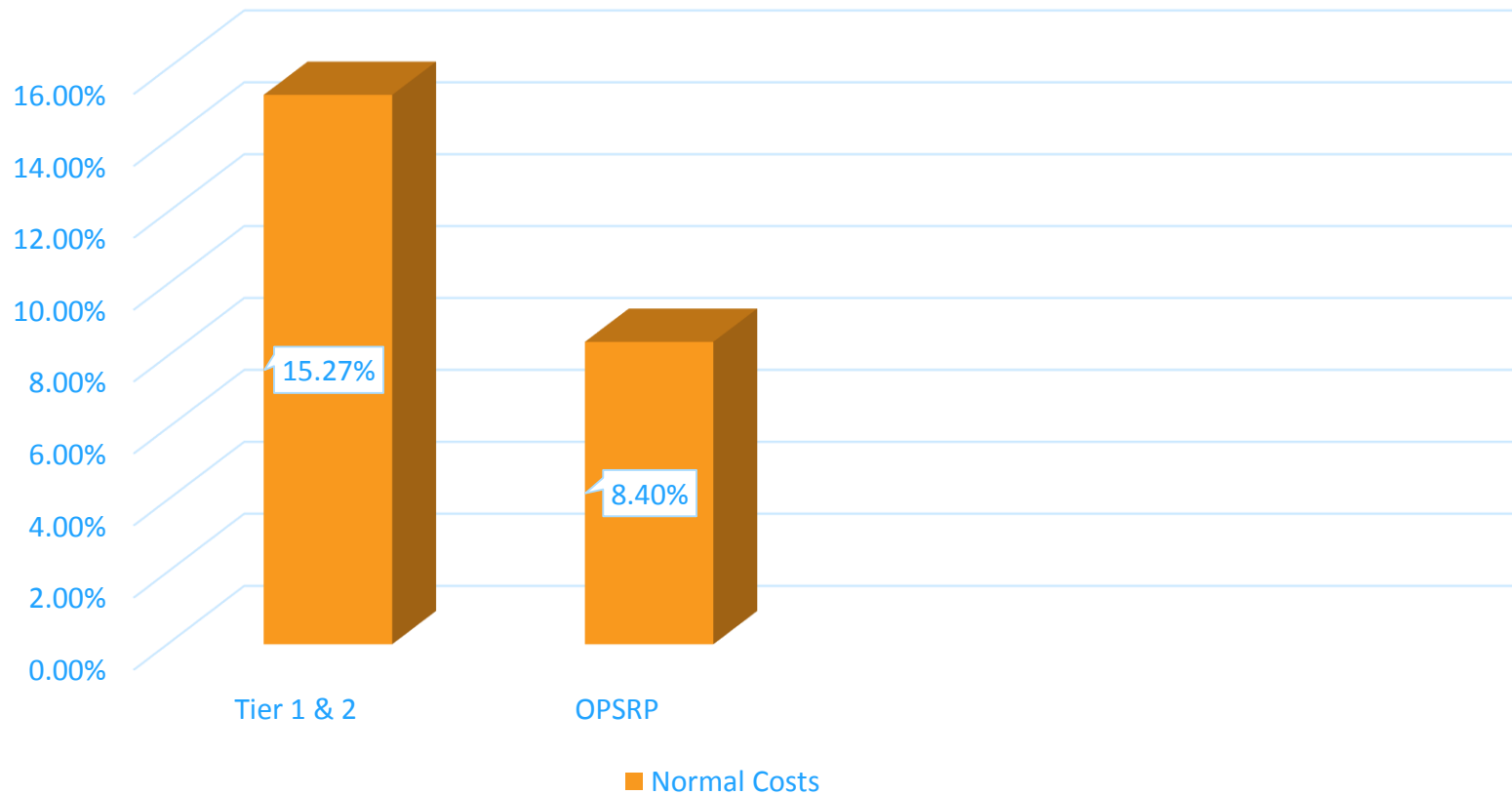
Formula = 1.5%/year = 45% of FAS at 30 years

Full benefits @ age 65 or age 58 w/30 years

**Cost to Employers =
8.4% of payroll ongoing
+ UAL amortization**

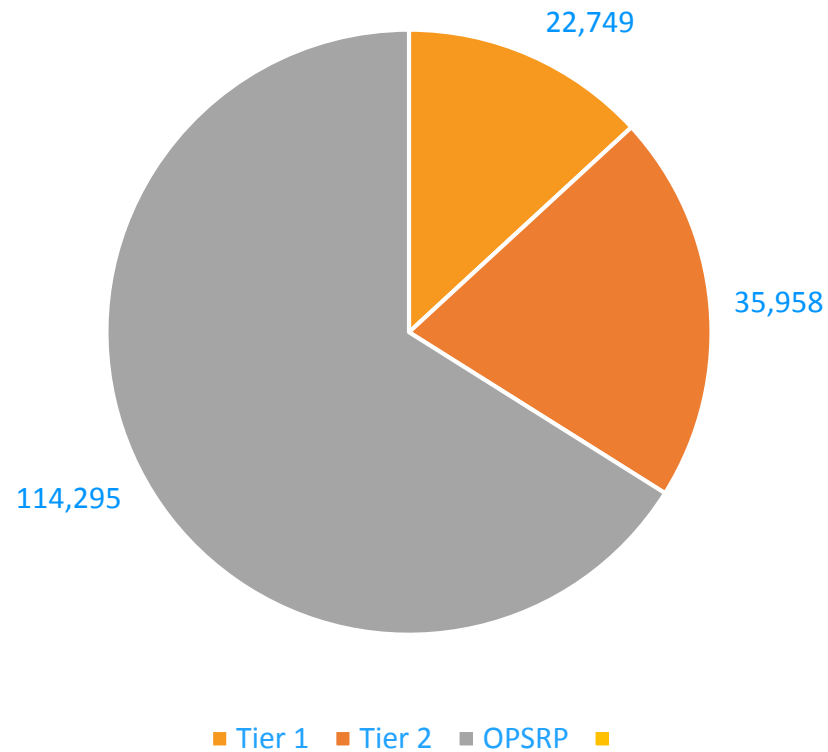
Tier 1 & 2 normal costs are nearly 2X OPSRP

Pension Costs (Excluding UAL) as % of Payroll

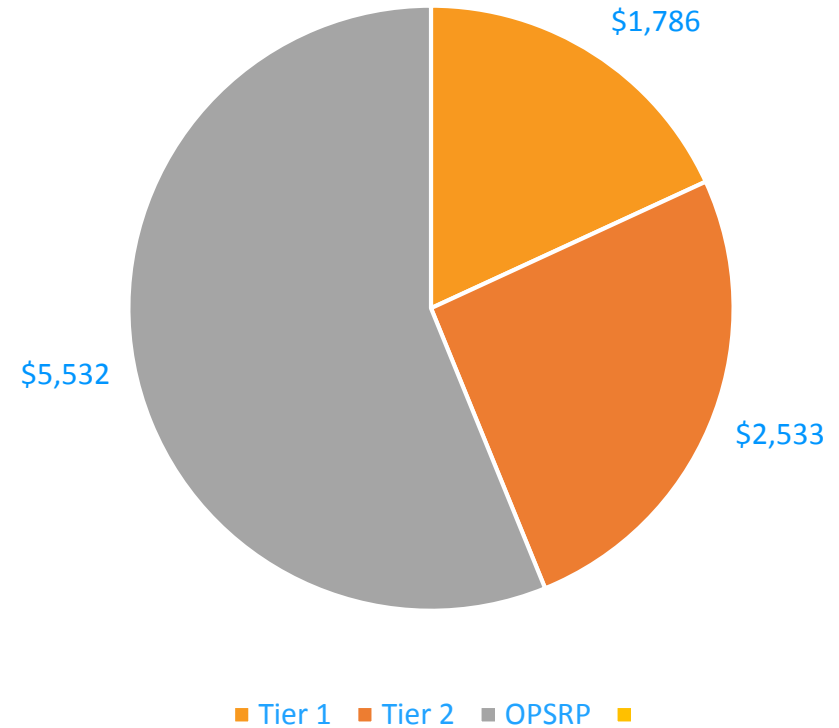


Tier 1&2 Employees remain a significant portion of the PERS-covered workforce

Numbers (Head Count)



Payroll (Millions of \$)



OPSRP: Adequate, affordable, competitive

- OPSRP is an adequate and competitive plan for employees and more affordable for taxpayers
- OPSRP is better than Washington State's teachers' plan

	% Salary per Year of Service	Final Average Salary	EE Contribution to Supplemental Savings
Oregon PERS OPSRP	1.5%	3 years	6.0% fixed
WA State Teachers	1.0%	5 years	5.0% minimum

The Case for a Defined Contribution Plan

Defined Benefit vs. Defined Contribution

Defined Benefit

- Favors career employee over those who come and go
- Favors employees with high rates of pay progression
- Difficult to project and control costs

Defined Contribution

- More fair to short term and lower-paid employees
- More portable and compatible with private sector plans
- More predictable for employers

Defined Contribution: The OHSU Experience

OHSU employees have option of:

- ❑ Defined contribution plan fully paid by the Employer at 12% of pay
- or**
- ❑ PERS pension, with employees paying 6% for the IAP
- DC Plan is the default option, enrolling 95% of new hires
- Only 26% of employees remain in the PERS pension plan
- Savings on the 74% of employees in the DC plan equate to 2.5% of payroll for post-2003 hires

Defined Contribution: The Universities' Experience

Oregon's public universities have created options for faculty and administrators to choose coverage under an alternative defined contribution plan.

At the University of Oregon, 23% of employees are enrolled in the university's alternative defined contribution plan. Costs for the least expensive of these plans approximate 9% of salary.

Reforms and Solutions

Framework for Comprehensive Reform

1. **Reduce going forward costs**, without retreating to substandard retirement benefits
2. **Reduce legacy costs**, within legal limits, focused on pre-2003 employees and retirees who benefit from high retirement payouts
3. **Limit growth of liabilities**, by aligning contribution rates to investment returns and salary experience
4. **Manage remaining liabilities**, to smooth out impacts on future generations

1. Reduce Going Forward Costs

2019 Legislative Concept:

Employee Choice & Shared Responsibility Act

- ✓ Reinststate employee cost sharing (6%) in all plans
- ✓ Expand IAP to create an alternative DC plan
- ✓ Allow employees to choose
 - Pension plan **or** defined contribution plan
 - ...but not both!
- ✓ Allow continuation of employer pickups

Employee Choice and Shared Responsibility

Employee Choice

(Staying in Pension Plan)

Employer Savings

Current with Pickup

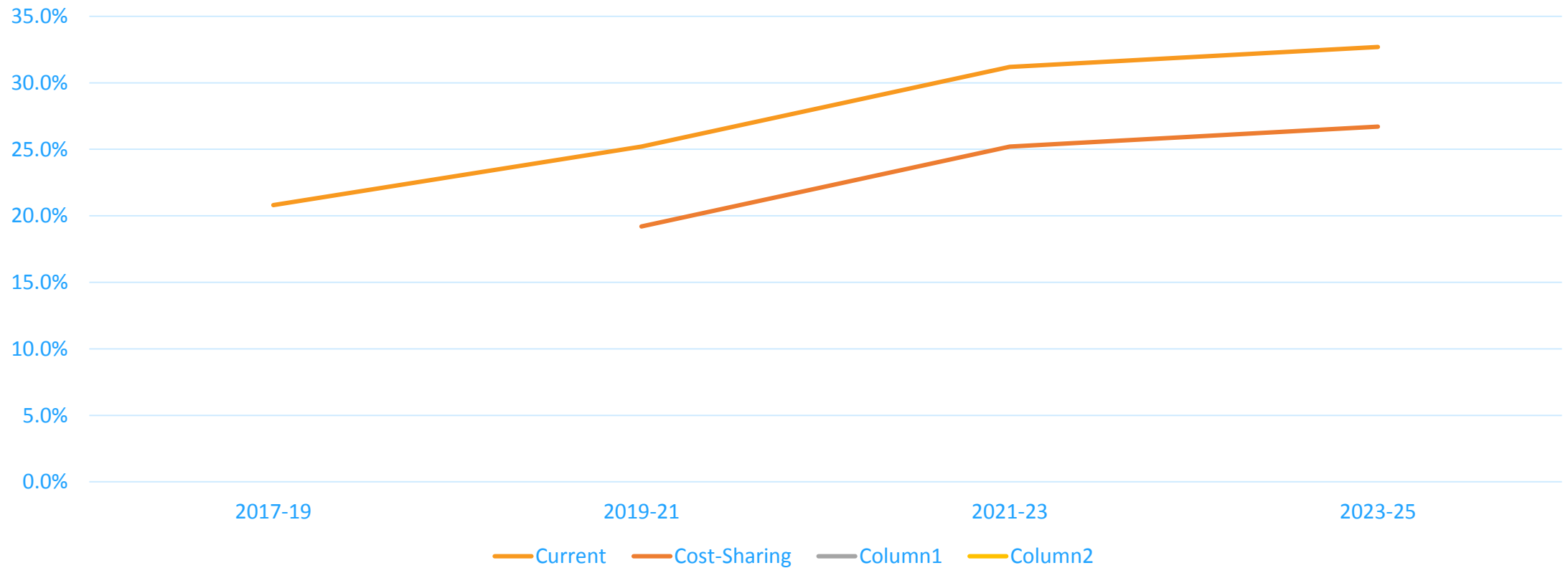
Tier 1 & 2 & OPSRP → 6% of payroll

Current w/o Pickup

→ 6% of payroll

Cost Sharing Will Halve the Cost Curve for Employers

Employer Rate Trends With and Without Cost Sharing



Legislative Concepts for 2019

2. Reduce Legacy Costs

2019 Legislative Concept:

Working Retirement/Pay Back Plan

- Allow Tier 1/2 employees who are retirement eligible to:
 - continue working (for up to five years)
 - draw a salary and a retirement allowance
 - contribute from salary to buy down UAL
- Direct all employer and employee contributions to buy down the UAL

Working Retirement/Pay Back Plan

Benefits:

- Employers buy down the UAL at 30% vs. 10% of payroll for each participant
- Employees gain more income over time

Challenges:

- IRS regulations for qualified retirement plans limit participation to certain employees (over age 55-57) and impose other conditions by type of employer
- Public perception of “double dipping”

3. Limit Growth of Liabilities

Reducing the going forward costs of the system may not be enough to keep the UAL from growing, forcing taxpayers to chase a rising target. Other reforms will be necessary to limit the growth of the UAL.

Examples:

- Risk sharing: If investment returns fail to match assumed earnings, adjust employer and employee contribution rates.
- Payroll management: If employers provide annual salary increases above the assumed rate of 3.5%, they'll increase their UAL. Create a mechanism to manage payrolls so that employers are aware of this effect, consider this effect in bargaining and require that such costs be recognized when created.

4. Manage Remaining Liabilities

“Is there a better way to pay off this liability – one that doesn’t just kick the can down the road BUT also one that doesn’t kick to the side of the road a whole generation of Oregonians whose educations will be compromised and whose social supports will be stretched to the breaking point?”

--Tim Nesbitt, Oregon Leadership Summit, 12/3/18

Examples:

- ❑ Longer amortization periods
- ❑ Year-to-year borrowing to offset scheduled rate increases
- ❑ State assistance for schools and local governments
- ❑ Prioritization of programs targeted for assistance

New Developments

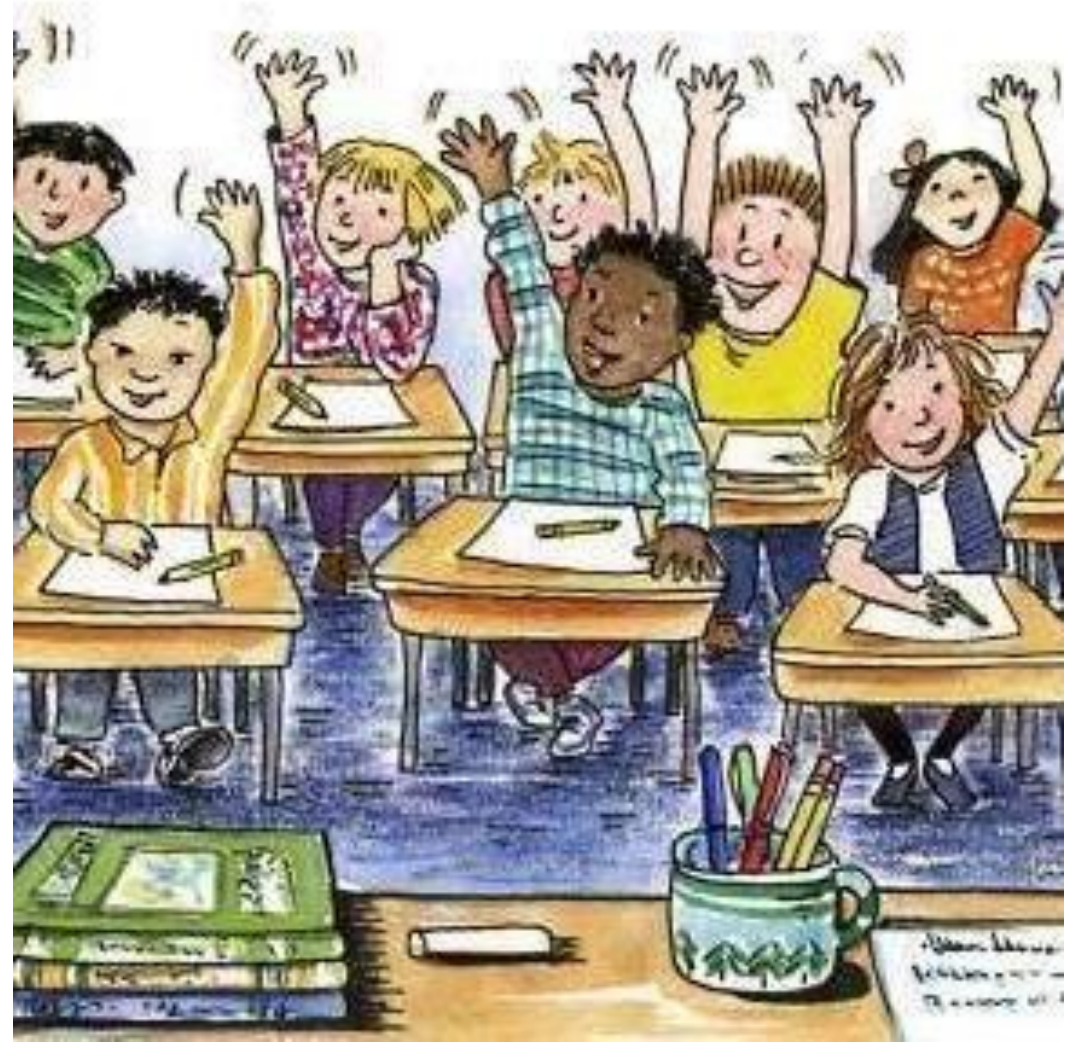
- ❑ Lagging Investment returns in 2018 are likely to add \$4-\$5 billion to the UAL
- ❑ LFO report notes the high reliance of Oregon PERS on investment returns.

Key Take-aways

- ❑ Reforms are **necessary and urgent** to avoid harm to “kids in today’s classrooms” and those who rely on state services
- ❑ Reforms can be **legal**
- ❑ Reforms can be **fair**
 - ❑ Benefits will remain adequate for employees
 - ❑ Employees can be given new choices to tailor benefits to career plans
 - ❑ Competitive for employers
 - ❑ More affordable for taxpayers
- ❑ **Responsibility of the state** to enact reforms and manage the system’s liabilities
- ❑ Pathway to tax reform and **“doing more with more”**

Best reason for
reform?

Kids
in today's
and tomorrow's
classrooms!



Questions and Discussion

For more information:

<https://oregonbusinessplan.org/2018-summit-recap/>

EMPLOYEE CHOICE & SHARED RESPONSIBILITY ACT

Current Law: Retirement Benefits and Costs

Currently PERS requires all participating employers (state, school districts, cities, counties and special districts) to offer both a pension plan, the costs of which are borne in full by employers, and a 401K-style retirement savings plan, the costs of which are paid by employees or picked up by their employers.

The costs of the PERS pension plans, with three different benefit formulas based on an employee's date of hire, now amount to 20% of payroll, will increase to 25% of payroll in July 2019 and will top out above 30% of payroll within two to four years thereafter.

The 401K-style retirement savings plan, known as the Individual Account Program or IAP, is supported by employee contributions of 6% of salary, which, for two-thirds of all payrolls, is picked up by employers as part of an employee's salary package.

Proposed Changes

Employee Choice

Effective 1/1/20, this legislation will require that all current employees and all new hires choose enrollment in either the PERS pension plan (at the benefit level applicable to their date of employment) or an expanded version of the IAP administered by the PERS Board.

Shared Responsibility for Financing Future Benefits

In the pension plans, all employees will be required to contribute 6% of salary to share in the cost of benefits accruing on a going forward basis.

In the expanded retirement savings plan, to be known as the Individual Retirement Savings Plan (IRSP), employers will be required to contribute 6% of an employee's salary to match the 6% contributed by employees. In effect, this would double the existing IAP. Other provisions:

- All employer and employee contributions shall vest for the employee on day one.
- Upon retirement, employees shall be offered the option of PERS-administered annuities based on their account balances and PERS estimated earnings rate.

Salary Cap: Extends the maximum salary for employer and employee contributions, pursuant to Internal Revenue Code Section 401(a)(17), to active members in the Tier 1 pension plan. Note: The current limitation is \$275,000 per year, adjusted annually for inflation. Currently, Tier I members are exempt from this limit. With this change, all employees in all plans would be subject to the same limitation.

Maintenance of Employee IAP Accounts: For current employees opting for the pension plan, the existing IAP will close to new contributions on 1/1/20, but employee account balances shall be maintained by PERS and shall continue to be credited with interest until withdrawn by the employee.

Continuation of the Employer Pickup: Where employers pick up the employee contribution of 6% to the IAP, employers may continue such practices provided they apply these payments to the employee's contribution to the pension plan or to the IRSP, whichever is applicable.

Analysis of Effects

Employer savings would amount to approximately 6% of payroll initially, but would decline over time as more employees choose to enroll in the IRSP.

- For current public employees who remain in PERS pension plans, employers would receive a dollar-for-dollar credit against their required contribution rates, amounting to 6% of payroll.
- For new hires who choose to enroll in the pension plan, the savings for employers would also amount to 6% of payroll.
- For new hires who choose to enroll in the retirement savings plan, savings for employers would amount to approximately 2.5% of payroll.

Effect on Budgets, Services and Salaries: Employer savings of 6% of payroll would amount to \$630 million per year, initially, which would free up resources for services, staffing and raises.

No Effect on Employee Paychecks: No employee would incur any reduction in pay from these changes. Where employers now pick up an employee's 6% IAP contribution, they would continue to pick up the employees' 6% contributions to the pension plans or the savings plan. Where employees now pay their own 6% contribution to the IAP, they would shift their payments to the pension plan or the retirement savings plan.

No Effect on Employee Pension Benefits: Benefits for employees in the pension plans would remain the same (with the exception of the salary cap for Tier 1), but would no longer be supplemented by the IAP.

WORKING RETIREMENT/PAY BACK PLAN

Current Law: Post-Retirement Employment

Current law allows Tier 1 and 2 retirees to be employed for up to 1,040 hours per year while collecting retirement benefits (with exceptions for certain low-population counties). Such retirees earn a salary for their positions and continue to collect their retirement benefits. During such periods of employment, they do not accrue further retirement benefits and their employers do not pay into the PERS system for these employees.

Proposed Change

Employees enrolled in Tier 1 and 2 of the PERS pension plans who are eligible to retire may qualify for a program whereby they continue to work in their current positions, begin to draw the retirement benefit to which they are entitled, but no longer accrue retirement benefits thereafter, provided:

- The employee earns no more than the salary for his/her pre-retirement position and contributes 6% of salary to the employing jurisdiction's PERS Liability Reduction Fund;
- The employing jurisdiction contributes the applicable PERS employer pension contribution rate to its PERS Liability Reduction Fund; and,
- Participation is subject to annual approval by the employing jurisdiction and is consistent with IRS rules for early retirement programs for qualified plans.
- The program is limited to employment by the jurisdiction from which the employee retired;
- Employment contracts are subject to annual renewal;
- Employment is limited to no more than five years after retirement.

Analysis of Effects

Buy Down of Employer Liabilities: Employers would generate as much as 30% of salary for each such position to be applied to the reduction of its unfunded actuarial liability for PERS – compared to no UAL reduction for Tier 1 and 2 retirees under current law and roughly 10% reductions for the continued employment of Tier 1 and 2 employees.

Employee Benefits: Participating employees would secure compensation (in salary and pension benefits) that would exceed what they would otherwise receive from delaying their retirement to a later age.

Staffing Needs: Employers would be able to retain experienced employees where needed and avoid a "rush to the exits" with changes made to the Tier 1 and 2 benefit system.

Doctorate of Physical Therapy

WOU Board of Trustees
January 16, 2019



Western Oregon
UNIVERSITY



Oregon Setting

- 2 DPT programs in Oregon (Pacific and George Fox)
 - Number of qualified applicants 2016: >1,000
 - Number of spaces for new students: 100
- Median Oregon salary \$81-85 K (depending on source)



New Enrollment Possibilities

- Graduate
 - Physical Therapy Program: 120-150 students
 - Future opportunities to consider a Occupational Therapy Doctoral Program
- While the present DPT proposal is for a graduate program, there are likely undergraduate opportunities, if a DPT program is launched
 - Health Science degree(s)
 - Physical Therapy Assistant (if CAPTE increases degree requirement to bachelors degree)



Campus Meetings

- Faculty Senate Executive Committee
- Faculty Senate (three times)
- Health and Exercise Science Faculty
- Biology Faculty
- Behavioral Sciences Faculty
- Graduate Studies Committee (twice)
- University Council
- President's Cabinet
- WOU DPT Faculty Advisory Taskforce
- Board of Trustee's Academic and Student Affairs Committee



NEAL W. WERNER UNIVERSITY CENTER

Approval Process



Western Oregon
UNIVERSITY

Approvals Required

- *Graduate Studies Committee - done*
- *Faculty Senate – done*
- *WOU Board of Trustees – Jan. 16th*
- *Statewide Provost Council – Feb 5th*
- *Higher Ed Coordinating Commission (HECC) – April 10th*
- *Northwest Commission on Colleges and Universities (NWCCU) – Submit on April 11th*
- *Commission on Accreditation in Physical Therapy Education (CAPTE) - unknown*



Draft Curriculum



Western Oregon
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DPT Curriculum

- 3 year curriculum totaling 162 credits
- 46 courses

Clinical Placements

- 1st Clinical placement Summer Year 1 (4 weeks)
- 2nd Clinical placement Spring Year 2 (6 weeks)
- 3rd Clinical placement Fall Year 3 (8 weeks)
- 4th Clinical placement Winter Year 3 (9 weeks)
- Final Clinical placement Spring Year 3 (10 weeks)

Applied Research

- 1st Applied research Fall Year 2
- 2nd Applied research Summer Year 2
- Final Applied research Spring Year 3



DPT Curriculum

Draft Curriculum: DPT

Fall	Cr	Winter	Cr	Spring	Cr	Summer (5 weeks)	Cr
PDPT500 Prof. Practices in Physical Therapy	3	PDPT501 Basic Patient Care Skills	3	PDPT512 Human Anatomy	3	PDPT580 Clinical Internship (4 weeks)	4
PDPT510 Human Anatomy	3	PDPT511 Human Anatomy	3	PDPT522 Biomechanics and Kinesiology	3	PDPT561 Research Methods and EBP	4
PDPT520 Biomechanics and Kinesiology	3	PDPT521 Biomechanics and Kinesiology	3	PDPT533 Neuroscience and Motor Control	3		
PDPT531 Neuroscience and Motor Control	3	PDPT532 Neuroscience and Motor Control	3	PDPT552 Therapeutic Exercise and Modalities	3		
PDPT550 Therapeutic Exercise and Modalities	3	PDPT551 Therapeutic Exercise and Modalities	3	PDPT560 Research Methods and EBP	3		
PDPT570 Applied Physiology/Pathophysiology	3	PDPT571 Applied Physiology/Pathophysiology	3	PDPT572 Applied Physiology/Pathophysiology	3		
Total	18	Total	18	Total	18	Total	8

Fall	Cr	Winter	Cr	Spring	Cr	Summer (4 weeks)	Cr
PDPT600 Cardiovascular and Pulmonary PT	4	PDPT611 Medical Surgical and Integumentary	4	PDPT632 Neurorehabilitation	3	PDPT640 Pain and Social Responsibility in Physical Therapy	4
PDPT610 Pharmacology for PT	3	PDPT620 Geriatric Physical Therapy	3	PDPT652 Orthopedic Assessment and Rehab	3	PDPT690 Diagnostic Imaging	3
PDPT630 Neurorehabilitation	3	PDPT631 Neurorehabilitation	3	PDPT660 Prosthetics and Orthotics	3	PDPT751 Clinical Research	3
PDPT650 Orthopedic Assessment and Rehab	3	PDPT649 Medical Screening and Differential Diag.	4	PDPT680 Clinical Internship (6 weeks)	6		
PDPT670 Pediatric Physical Therapy	4	PDPT651 Orthopedic Assessment and Rehab	3				
PDPT750 Clinical Research	1						
Total	18	Total	17	Total	15	Total	10

Fall	Cr	Winter	Cr	Spring	Cr		
PDPT780 Clinical Internship II (8 weeks)	8	PDPT781 Clinical Internship IV (9 weeks)	9	PDPT782 Clinical Internship V (10 weeks)	10		
PDPT719 Health and Wellness in PT	3	PDPT720 Administration in Physical Therapy	2	PDPT752 Clinical Research	3		
PDPT730 Professional Seminar	3	PDPT770 Special Topics	2				
Total	14	Total	13	Total	13		



TOGETHER WE SUCCEED



Proposal for a New Academic Program

Institution: Western Oregon University

College/School: College of Health Sciences

Department/Program Name: Physical Therapy

Degree and Program Title: Doctor of Physical Therapy

1. Program Description

- a. Proposed Classification of Instructional Programs (CIP) number.

CIP Code 51.2308

Title: Physical Therapy/Therapist.

Definition: A program that prepares individuals to alleviate physical and functional impairments and limitations caused by injury or disease through the design and implementation of therapeutic interventions to promote fitness and health. Includes instruction in functional anatomy and physiology, kinesiology, neuroscience, pathological physiology, analysis of dysfunction, movement dynamics, physical growth process, management of musculoskeletal disorders, clinical evaluation and measurement, client assessment and supervision, care plan development and documentation, physical therapy modalities, rehabilitation psychology, physical therapy administration, and professional standards and ethics.

- b. Brief overview (1-2 paragraphs) of the proposed program, including its disciplinary foundations and connections; program objectives; programmatic focus; degree, certificate, minor, and concentrations offered.

The Doctorate in Physical Therapy (DPT) program is a three-year professional doctorate degree that will prepare students for careers as physical therapists and faculty in Physical Therapy programs. The program is built upon a foundation of anatomy and physiology, biomechanics and kinesiology, physiology, and neuroscience that is complemented by applied research, clinical practice, and rehabilitation.

The program will meet all national accreditation requirements as prescribed by the Commission on Accreditation in Physical Therapy Education (CAPTE). The forty-two learning outcomes required of all CAPTE accredited programs will be delivered by forty-two courses and four supervised clinical experiences.

- c. Course of study – proposed curriculum, including course numbers, titles, and credit hours.

The curriculum is comprised of 162 quarter credits of graduate course work.

Fall I	cr	Winter I	cr	Spring I	cr	Summer I (5 weeks)	cr
DPT 700 Prof. Practices in Physical Therapy	3	DPT 701 Basic Patient Care Skills	3	DPT 713 Human Anatomy III	3	DPT 714 Clinical Internship I (4 weeks)	4
DPT 711 Human Anatomy I	3	DPT 712 Human Anatomy II	3	DPT 722 Biomechanics and Kinesiology III	3	DPT 756 Research Methods and EBP II	4
DPT 720 Biomechanics and Kinesiology I	3	DPT 721 Biomechanics and Kinesiology II	3	DPT 732 Neuroscience and Motor Control III	3		
DPT 730 Neuroscience and Motor Control I	3	DPT 731 Neuroscience and Motor Control II	3	DPT 742 Therapeutic Exercise and Modalities III	3		
DPT 740 Therapeutic Exercise and Modalities I	3	DPT 741 Therapeutic Exercise and Modalities II	3	DPT 755 Research Methods and EBP I	3		
DPT 750 Applied Physiology/Pathophysiology I	3	DPT 751 Applied Physiology/Pathophysiology II	3	DPT 752 Applied Physiology/Pathophysiology III	3		
Total	18	Total	18	Total	18	Total	8
Fall II		Winter II		Spring II		Summer II (4 weeks)	
DPT 760 Cardiovascular and Pulmonary PT	4	DPT 763 Geriatric Physical Therapy	3	DPT 772 Neurorehabilitation III	3	DPT 767 Pain and Social Responsibility in Physical Therapy	4
DPT 761 Pharmacology for PT	3	DPT 764 Medical Surgical and Integumentary	4	DPT 782 Orthopedic Assessment and Rehab III	3	DPT 768 Diagnostic Imaging	3
DPT 770 Neurorehabilitation I	3	DPT 771 Neurorehabilitation II	3	DPT 766 Prosthetics and Orthotics	3	DPT 704 Clinical Research II	3
DPT 780 Orthopedic Assessment and Rehab I	3	DPT 765 Medical Screening and Differential Diag.	4	DPT 715 Clinical Internship II (6 weeks)	6		
DPT 762 Pediatric Physical Therapy	4	DPT 781 Orthopedic Assessment and Rehab II	3				
DPT 703 Clinical Research I	1						
Total	18	Total	17	Total	15	Total	10
Fall III		Winter III		Spring III			
DPT 716 Clinical Internship III (8 weeks)	8	DPT 717 Clinical Internship IV (9 weeks)	9	DPT 718 Clinical Internship V (10 weeks)	10		
DPT 795 Health and Wellness in PT	3	DPT 796 Administration in Physical Therapy	2	DPT 705_3 Clinical Research III	3		
DPT 708 Professional Seminar	3	DPT 706 Special Topics	2				
Total	14	Total	13	Total	13		

d. Manner in which the program will be delivered, including program location (if offered outside of the main campus), course scheduling, and the use of technology (for both on-campus and off-campus delivery).

The courses will be delivered on the Monmouth campus and clinical placements will occur at hospitals, clinical therapy offices, and other clinical settings where licensed physical therapists provide patient care. The primary clinical sites will be in the mid and lower Willamette Valley and Oregon coast. Technology will be utilized to enhance the student learning and applied research that will be hallmarks of this program. This will be a full-time, twelve-month program.

e. Adequacy and quality of faculty delivering the program.

CAPTE accreditation standards mandate that the core faculty have doctoral degrees with at least half of having earned a Doctorate in Physical Therapy. In addition, core faculty will have current expertise in their areas of instructional duties, must demonstrate teaching effectiveness, and be active researchers¹. Faculty teaching clinical courses must also have a current license as a Physical Therapist². As a whole, at least half of the DPT faculty must have academic doctorates (Ph.D.'s)³.

f. Adequacy of faculty resources – full-time, part-time, adjunct.

The DPT faculty will be primarily full-time with adjunct faculty used to bring in specific areas of expertise to complement the core full-time faculty. CAPTE requirements specify that the core faculty be responsible for the academic and clinical preparation of the students in the program. CAPTE mandates minimum pass rates on the national licensing examination. The WOU DPT program will be housed in a new building that will include faculty offices, instructionally-supportive technology, clinical research space and other instructional space to support student-learning.

Other staff.

g. Adequacy of facilities, library, and other resources.

¹ CAPTE standard 4A and 4B.

² CAPTE standard 4I.

³ CAPTE standard 4K.

⁴ Oregon Employment Department “High Wage, High Demand Occupations” January 2018

There are two significant fiscal elements: facility and operational. The DPT will require instructional and research space that WOU currently lacks. The two options are renovation of a current space or construction of a new facility. Accreditation requirements mandate that faculty in the DPT program are active researchers. Supporting the research activities of the new DPT faculty is an opportunity to create research space that can also support the research activities of other WOU faculty and students. The research facilities needed to support the faculty and students in the DPT program will not be as extensive as those required in traditional research-intensive settings since the DPT research will be more application-focused.

The library collections will be increased to support the research and instructional needs of faculty and students. The program's increased use of technology will also require the addition of a dedicated staff person to support the technology needs.

h. Anticipated start date.

The program is expected to start Fall term 2022.

2. Relationship to Mission and Goals

- a. Manner in which the proposed program supports the institution's mission, signature areas of focus, and strategic priorities.

Adding a Doctorate in Physical Therapy program to WOU is strongly aligned with the WOU Strategic Plan in many ways. The most critical are noted below.

- 1.1.1 Providing a campus environment that enhances learning
- 1.3.3 Support curricular innovation and accountability
- 2.1.2 Increase support for programs and activities that demonstrate and inspire academic excellence
- 2.4.1 Promote academic array that provides distinctive, high-quality programs
- 3.1.1 Adopt experiential learning guidelines and align high-impact practices with these guidelines
- 3.2.1 Increase support for student engagement in community service.
- 3.2.4 Create and enhance educational partnerships with local communities, particularly for underrepresented student groups.
- 4.2.1 Develop institutional research capacity
- 5.1.3 Support growth of academic programs to include new and innovative degrees and certificates

In support of the WOU Strategic Plan a Strategic Enrollment Plan has been developed. The DPT proposal is aligned with the enrollment plan in three key areas.

- 1.2. Develop additional flexible course offerings
- 2.0 Develop Doctorate in Physical Therapy
- 2.2 Program delivery that promotes graduate student access

- b. Manner in which the proposed program contributes to institutional and statewide goals for student access and diversity, quality learning, research, knowledge creation and innovation, and economic and cultural support of Oregon and its communities.

Institutional goals:

The DPT program supports multiple elements of the WOU strategic plan including academic excellence, community engagement (pro-bono clinic for local residents and students lacking health insurance), and sustainability. The DPT program will expand WOU academic offerings and creates research opportunities, for faculty and students. Various new technologies to support instruction will be tested in program. Those that are effective can be applied to other academic programs and facilities on campus.

Statewide goals:

The DPT program will actively support multiple HECC strategies outlined in the Spring 2016 Strategic Plan. These include:

- Strategy 1: Goal-setting. The WOU DPT program will create a synergistic impact on related WOU undergraduate programs. The OHSU Nursing program was a catalyst to a growth in WOU's Biology and Exercise Science undergraduate programs. This growth supports statewide attainment of 40-40-20. As a campus that has continually achieved higher retention and graduation rates for Latinx students, the expected increase in student enrollment in biology, exercise science, and health at WOU will result in an increase in the number of Latinx students who enroll and complete their degrees as well. WOU will actively recruit Latinx and other under-represented students to the current undergraduate degree programs as well as to the DPT program.
- Strategy 3: Pathways. The DPT program has created an external advisory committee that includes leading physical therapist and major health care providers. The committee will work with WOU to create a program that strongly connects WOU students and faculty with the employers and communities so that students have the most effective and efficient pathways leading to successful transition into their physical therapy career.
- Strategy 5 Affordability. The WOU program will have a tuition that is projected to be approximately \$5,000 below the cost of the two established programs in Oregon.
- Strategy 6 Economic and Community Impact. The WOU program will serve a region of Oregon that is not being actively served by the two private universities that have DPT programs. The planned pro-bono clinic on the WOU campus will serve residents of Polk County who would not otherwise have access to affordable physical therapy. WOU will focus on enrolling students from the current WOU enrollment footprint. Our primary clinical placements will be outside Portland and again focus on serving all communities within the main WOU enrollment footprint.

The DPT program will focus on enrolling Oregon students and will primarily offer clinical placements in the state of Oregon. Doing so will increase the likelihood that the program will improve the availability of physical therapists throughout the mid-Willamette Valley and the coast.

- c. Manner in which the program meets regional or statewide needs and enhances the state's capacity to:
 - i. improve educational attainment in the region and state;
The DPT program at WOU will increase student and family awareness of this degree and career. As a university that effectively serves low-income, first-generation and minority students from all Oregon communities, WOU's DPT program will increase student and family awareness and aspirations. This increased awareness will support higher academic aspirations and attainment. The research facilities that are required for program accreditation will be available for use by other WOU faculty. Nearly all WOU

faculty who are active in research utilize undergraduate students in their activities. Students who engage in high-impact activities such as research are more likely to succeed in college (see George Kuh-2013 and AACU studies).

- ii. respond effectively to social, economic, and environmental challenges and opportunities; and

According to the Oregon Employment Department⁴ physical therapists are one of the top high wage and high demand occupations in Oregon. A November 30, 2018 search of available jobs in Oregon listed by Indeed.com found 883 openings for licensed physical therapists. Jobs were available across the state and included local clinics, hospitals, assisted living centers, and rehabilitation centers. The lack of physical therapists has a detrimental social and welfare impact on communities across the state.

- iii. address civic and cultural demands of citizenship.

The DPT program's design to include an on-site pro-bono clinic, its emphasis on enrolling and graduating Oregon residents, especially those from under-served communities, will directly and indirectly support the creation and strengthening of an ethos of service and community engagement.

The DPT provides a meaningful opportunity for WOU to better connect with the Monmouth/Independence community by providing a facility and content to support wellness training and physical therapy for low-income residents. There is an opportunity to create a pro bono clinic for low-income community members. Most of the DPT faculty will be licensed physical therapists and some of them will need a requisite number of hours in order to maintain their nationally recognized specializations (e.g., pediatrics, neurologic, geriatric, etc.).

3. Accreditation

- a. Accrediting body or professional society that has established standards in the area in which the program lies, if applicable.

CAPTE (Commission on Accreditation in Physical Therapy Education)

- b. Ability of the program to meet professional accreditation standards. If the program does not or cannot meet those standards, the proposal should identify the area(s) in which it is deficient and indicate steps needed to qualify the program for accreditation and date by which it would be expected to be fully accredited.

We have designed the program to comply with all CAPTE standards including the 42 learning outcomes. The program curriculum is mapped to every learning outcome, the faculty and facilities will meet or exceed all CAPTE requirements. WOU has designed the DPT program in close consultation with established DPT programs in Oregon and the nation. The Program Director will need to be approved by CAPTE, further ensuring the expertise and capacity to be fully accredited. The stringent nature of CAPTE Accreditation ensures that the WOU DPT program will be of high quality.

⁴ Oregon Employment Department "High Wage, High Demand Occupations" January 2018

- c. If the proposed program is a graduate program in which the institution offers an undergraduate program, proposal should identify whether or not the undergraduate program is accredited and, if not, what would be required to qualify it for accreditation.

NA

- d. If accreditation is a goal, the proposal should identify the steps being taken to achieve accreditation. If the program is not seeking accreditation, the proposal should indicate why it is not.

WOU will follow the prescribed CAPTE accreditation path which involves the following steps:

- WOU Academic Review including approval by Faculty Senate and WOU Board of Trustees
- Approval by Provost Council and HECC
- Approval by NWCCU
- Approval by CAPTE (Pre-candidacy application—May 2019, CAPTE Candidacy--September 2021, CAPTE Accreditation—Spring 2025*⁵)

4. Need

- a. Anticipated fall term headcount and FTE enrollment over each of the next five years.

The proposed three-year program at WOU would initially enroll new cohorts of 40 students, moving to 50 student cohorts in 2025. The DPT program will support greater research activity by the WOU faculty and provide undergraduate students with meaningful research and internship opportunities.

Year	Cohort Size	Total Enrollment
2022-23	40	40
2023-24	40	79
2024-25	40	118
2025-26	50	128
2026-27	50	138

- b. Expected degrees/certificates produced over the next five years.

Year	Number of Degrees
2022-23	0
2023-24	0
2024-25	39

⁵ CAPTE does not award full accreditation until the initial cohort of students has completed all coursework and clinical requirements.

2025-26	39
2026-27	40

- c. Characteristics of students to be served (resident/nonresident/international; traditional/nontraditional; full-time/part-time, etc.).

The DPT program will focus on serving Oregon students, but will enroll qualified students from outside the state. The university anticipates creating a formal pathway for qualified WOU undergraduates into the DPT program. This pathway may operate as an early admit, preferential admit or some other similar program. As with all other WOU programs, the DPT program will make a deliberate attempt to recruit and enroll students from all backgrounds, with particular attention paid to students from underserved communities.

The program will be taught using a cohort model and students will be required to attend full-time.

- d. Evidence of market demand.

Oregon has two CAPTE accredited schools (George Fox University and Pacific University). Both programs admit new cohorts of 50 students each year into their three-year DPT programs. George Fox is a newer program that has admitted students into their program for four years. Pacific University’s program is well established and received 1,145 applications for its most recent entering cohort. Washington has three DPT programs (Eastern Washington University, University of Puget Sound, and University of Washington). California has 15 programs including five at CSU campuses (Fresno, Long Beach, Northridge, Sacramento, and San Diego).

In 2016, WOU contracted with STAMATS to do a market analysis and identify high need and high growth areas for graduate programming. The report concluded that “DPT is a high demand program, and has experienced growth in the number of degrees (and also degree providers) over the past several years—increasing from about 8,000 degrees in 2010 to well over 10,000 degrees in 2014. This program areas has experienced an average annual growth rate of about 6%, with an annual increase of about 521 new degrees per year. Nearly three-quarters of all programs experienced positive growth trends.” p. 95

- e. If the program’s location is shared with another similar Oregon public university program, the proposal should provide externally validated evidence of need (e.g., surveys, focus groups, documented requests, occupational/employment statistics and forecasts).

NA

- f. Estimate the prospects for success of program graduates (employment or graduate school) and consideration of licensure, if appropriate. What are the expected career paths for students in this program?

According to the U.S. Bureau of Labor Statistics Occupational Outlook Handbook, the demand for physical therapists is projected to grow by 34 percent from 2014-2024. This is far above the average demand growth rate for other occupations. The projected growth for Oregon is expected to 37.4%. Professional licensure to become a physical therapist requires a DPT awarded from a college or university that is accredited by CAPTE. Although, physical therapist who were initially licensed when only a master level degree was required have been allowed to maintain their licensure.

5. Outcomes and Quality Assessment

- a. Expected learning outcomes of the program.

Overall, the programs learning outcomes are:

1. Demonstrate the ability to effectively practice in direct access clinical environments
2. Engage in ethical, collaborative, compassionate and culturally competent physical therapy
3. Demonstrate the ability to advocate for the health and wellness of society through education, consultation, and community outreach
4. Utilize scientific literature for clinical decision-making

CAPTE additionally prescribes “[Standards and Required Elements](#)” for accreditation. Standard 7 is related to student learning outcomes in that it specifies attitudes and skills that the curriculum develops in students (7D1-7D43).

- b. Methods by which the learning outcomes will be assessed and used to improve curriculum and instruction.

A matrix of courses and required learning outcomes has been developed to ensure that students meet all CAPTE required learning outcomes. Formative assessments will include student feedback obtained through the WOU course evaluation process that is conducted each academic term. Summative data will include the national exam pass rate (expected to be 100%), and placement into a physical therapy or teaching position within six months of graduation (expected to be 95% or higher). CAPTE provides annual data on these figures so WOU will have national and regional benchmarks to use for comparative analysis.

Feedback on student preparation will be gathered from all four clinical experiences required of students in the program. Students will also provide feedback regarding their clinical placement experiences. It is anticipated that the program will also survey recent graduates to receive qualitative feedback. Finally, the DPT program will regularly assess how students are meeting the CAPTE identified student outcomes in the courses that those outcomes are aligned to (see Appendix entitled WOU Curricular Map).

- c. Nature and level of research and/or scholarly work expected of program faculty; indicators of success in those areas.

CAPTE Accreditation requirements mandate that faculty in the DPT program are active researchers. Evidence of this required activity will include number of peer-reviewed scholarly articles published, number of professional presentations made at regional and national scholarly and professional conferences; and the number of DPT students who publish or present their work.

6. Program Integration and Collaboration

- a. Closely related programs in this or other Oregon colleges and universities.

There are two current DPT programs in Oregon (George Fox and Pacific University). WOU has closely collaborated with George Fox University in the development of the DPT curriculum. In addition WOU has met with and will continue to collaborate with the Lane Community College PT Assistant program. WOU has a dual enrollment agreement with Mt.

Hood Community College, which has the other PT Assistant Program. WOU will connect with Mt Hood to create a collaborative relationship with their program.

- b. Ways in which the program complements other similar programs in other Oregon institutions and other related programs at this institution. Proposal should identify the potential for collaboration.

CAPTE requirements for accreditation create DPT programs that are very similar. WOU will work with the two community college programs to create articulated pathways from the AA degree to a WOU Bachelor's degree that is aligned with the DPT entrance requirements. WOU will continue to collaborate with George Fox University while also attempting to build a relationship with Pacific University. WOU will offer Gerontology as its point of unique training. This complements the George Fox emphasis area of Sports Medicine and biomechanics.

- c. If applicable, proposal should state why this program may not be collaborating with existing similar programs.

Professional doctorate programs like the DPT program are designed to provide a very rigorous academic experience. The four clinical rotations add time demands that further limit the opportunity for students to collaborate with other programs. Clinical faculty in the program are required to have active Physical Therapy licenses. This requirement greatly limits their availability to collaborate with other colleges and universities.

- d. Potential impacts on other programs.

Given accreditation requirements the DPT coursework will generally be taught by new faculty who are licensed physical therapists and have at least one doctorate in the area of physical therapy, therefore the direct teaching requirements are not likely to affect current programs. However, there could be indirect impacts and opportunities for existing undergraduate programs, the Biology Department, Health and Exercise Sciences Division, and Behavioral Sciences Division. We have previously convened a Faculty Advisory Taskforce comprised of faculty from the above academic units to discuss impacts and opportunities. We have also visited the following campus groups in an effort to proactively collaborate before this proposal was submitted:

1. Faculty Senate
2. Faculty Senate Executive Committee
3. Health and Exercise Science Division
4. Biology Department
5. Behavioral Sciences Division
6. Graduate Studies Committee
7. University Council
8. President's Cabinet
9. WOUFT Leadership
10. WOU DPT Faculty Advisory Taskforce

7. External Review

If the proposed program is a graduate level program, follow the guidelines provided in *External Review of New Graduate Level Academic Programs* in addition to completing all of the above information.

Proposal for a New Academic Program

Institution: Western Oregon University

College/School: College of Education

Department/Program Name: Interpreting Studies (formerly ASL/English Interpreting Program)

Degree and Program Title: Bachelor of Arts in Interpreting Studies

1. Program Description

a. Proposed Classification of Instructional Programs (CIP) number.

16.1603 Sign Language Interpretation and Translation

“16.1603 Sign Language Interpretation and Translation. A program that prepares individuals to function as simultaneous interpreters of American Sign Language (ASL) and other sign language systems employed to assist the hearing impaired, both one-way and two-way. Includes instruction in American Sign Language (ASL), alternative sign languages, finger spelling, vocabulary and expressive nuances, oral and physical translation skills, cross-cultural communications, slang and colloquialisms, and technical interpretation.”

From: <http://nces.ed.gov/pubs2002/cip2000/cip2000.asp?CIP2=16.1603>

“----- Sign Language Interpretation and Translation (Report under 16. 1603)”

From: <http://nces.ed.gov/pubs2002/cip2000/ciplist.asp?CIP2=13>

b. **Brief overview (1-2 paragraphs) of the proposed program, including its disciplinary foundations and connections; program objectives; programmatic focus; degree, certificate, minor, and concentrations offered.**

We propose to phase out the current BA in Interpreting Studies curriculum, and replace it with the BA in Interpreting Studies: Theory (BAIST) curriculum described here. The BAIST curriculum will be the 4-year, undergraduate part of a 4+1 Master’s degree program in Interpreting Studies. The Master’s degree is described in a separate, but related, proposal.

Through program assessment, Interpreting Studies faculty -- Dr. Elisa Maroney and Ms. Amanda Smith -- identified a preparation gap between graduation from an interpreter education program and readiness-to-work/certification. The assessment findings indicate that graduating seniors studied have an average EIPA score of 3.39 (Smith & Maroney, 2017), which does not qualify the graduates to work in Oregon or in other states where the EIPA requirement is 3.5 or higher.

To address this gap, WOU's new BA in Interpreting Studies: Theory program provides a foundation in two focus areas – language studies and interpreting studies – that will prepare graduates for entry to a 45-credit MA degree program with an emphasis on observation, practice, supervision, and reflective practice. In total, the BA plus MA program duration will be five years and result in the award of an MAIS: Theory & Practice. Upon completion of the 4+1 degree, students will have a strong foundation from which to seek certification and provide effective and adaptive interpreting services. The present proposal establishes the BA portion of the 4+1 degree. It will, over time, replace the current BA in Interpreting Studies curriculum.

The new program's design differs from the program being replaced in that it engages interpreting faculty throughout the student's education starting freshman year, including as they complete foundational coursework including prerequisite language studies. The curriculum positions faculty to better support students at all levels as they make connections between program specific coursework and their professional goals. In addition, because native English speakers and those who are native/primary users of ASL have different needs, the program has developed distinct advising guides for each group to allow them to be equally equipped upon entry into interpreter coursework at the senior level.

Few, if any, interpreter education programs presently produce graduates with the professional skills necessary to provide adequate educational interpreting services to students who are deaf and hard of hearing (Smietanski, 2016; Smith & Maroney, 2017; Smith, 2010). The lack of professional skills, such as reflective practice, can be ameliorated by providing more balance in the undergraduate curriculum between technical versus adaptive skills, as the proposed curriculum does. In this way, we better prepare students to successfully complete a Master's degree in Interpreting Studies with the skills needed to be certified as an interpreter.

The undergraduate Interpreting Studies: Theory program includes 90 credits of general education & free elective credits, 42-credits in ASL or English, and 58-credits in Interpreting, 15 of which will be graduate-level credits during their senior year. Course of study – proposed curriculum, including course numbers, titles, and credit hours.

		time			
Credits	Low	High			
General ED	42	70	Upper Division	66	
Lang Focus (Major)	42	42			
INT Focus (Major)	58	58	**New/Revised Courses		
Other focus area/Free electives	38	10	Interpreting Focus		
	180	180	INT 120: Interpersonal Aspects of Interpreting	3	
ASL Language Focus			INT 242: Interpreter Mindset Seminar	2	
2nd year of ASL	12		INT 254: Intro to Interpreting Profession	3	
3rd year of ASL	12		INT 409: Practicum	3	
Deaf History	3		INT 260: Pre-Interpreting Skills Dev.	3	
Deaf Culture	3		INT 220: Environmental Aspects of Interpreting	4	
Linguistics of ASL	3		INT 320: Intrapersonal Aspects of Interpreting	4	
ASL Elective	6		Theory & Practice I-III 450/550, 451/551, 452/552	12	
1st & 2nd Language Acquisition	3	42	INT 392 Language Variance in Signed Language Interpreting	4	
English Language Focus			INT 462: Business Aspects of Interpreting	4	
LING 312 Lang & Society	4		INT 440: Ethics & Decision-Making	4	
ENG 386 Form and Meaning in Film	4		INT 469: Cultural Intelligence in a Diverse World	4	
LING 315 Structure of English	4		INT 465: Interpreting in Community Settings	4	
LING 350 Ling in the Digital Age	4		INT 440/540: Research & Current Issues	4	58
ANTH 325 Ethnographic Methods	4				
COM 325 Intercultural Comm	3				
LING 370 Meaning and Context	4				
LING 490 History of the English Language	4				
English Language Electives	6	37			

Courses at the 400/500 level are intended to not only complete the necessary credits & coursework for the BA in Interpreting Studies: Theory but also count toward the foundational coursework in the MA in Interpreting Studies: Theory & Practice track.

c. Manner in which the program will be delivered, including program location (if offered outside of the main campus), course scheduling, and the use of technology (for both on-campus and off-campus delivery).

- a. All courses will be available on campus and online.
- b. Course scheduling will be done through the division protocol for scheduling and courses will be taken in order stated above.

d. Adequacy and quality of faculty delivering the program.

a. **Dr. Elisa Maroney**, Ph.D., NIC, CI, CT, Ed: k-12, ASLTA Qualified, is a tenured professor. She teaches a 9 to 12-credit load each term, and shares curricular and advising responsibilities. Dr. Maroney holds a Ph.D. in Linguistics from the University of New Mexico. She served as a member of the Oregon Educational Interpreter Working Group from 1993 when she arrived in Oregon to coordinate the Summer Interpreter Education Program, to 2011. She was also a member of the RID-EIPA task force that made the historic and profession-changing recommendation to the RID Board of Directors that an EIPA Level 4.0 or higher and a passing score on the EIPA written test should be granted certified membership status. She was selected to act as a Meta-Facilitator at the RID 2017 LEAD Together Conference, one of 5 across the country. Dr. Maroney was selected to be one of thirteen Commissioners on the Commission on Collegiate Interpreter Education, joining the first accrediting body for interpreter education programs and the first group of Commissioners in 2006. She served the Commission as President from June 2011 to December 2013 followed by a 2-year term as Immediate Past President. She spent the 2015-2016 year on sabbatical leave teaching at the University of Education, Winneba, Ghana. She was the Project Director for the ASL/English Interpreting Program grant (H325K110246) from 2011 to 2015 when she left for Ghana. She is again serving in that role as the grant comes to a close. She has served on the Friends of Oregon School for the Deaf Council since 2015.

b. **Ms. Amanda R. Smith**, MA, NIC-Master, CI/CT, Ed: k-12, SC:L, holds an Associate of Applied Science in Sign Language Interpreting from Johnson Community College, a Bachelor of Science in Organizational Management and Leadership from Friends University, and a Masters in Interpreter Pedagogy from Northeastern University. She has served as a faculty member in the Division of Deaf Studies and Professional Studies since 2007. She currently chairs the Division and teaches in the undergraduate ASL/English Interpreting and Master of Arts in Interpreting Studies programs. In addition to her work at WOU, Ms. Smith continues to engage in the community with interpreters and other professionals, facilitating reflective art practices for professional development. She was also selected to act as a Meta-Facilitator at the RID 2017 LEAD Together Conference, one of 5 across the country.

c. **Ms. Sarah Hewlett**, MA, NIC, ED: k-12, holds a Bachelor of Science degree in Special Education and Rehabilitation with an emphasis in Educational Interpreting from the University of Arizona (2007) and a Master of Arts in Interpreting Studies from WOU (2013). She has been interpreting since 2007 in various settings, including: k-12, postsecondary, theatrical, religious, video relay service, and community settings. Ms. Hewlett has been a full time faculty member in WOU’s ASL/English Interpreting Program since 2013, and as Placement and Outreach Coordinator (a role she will continue in this grant), has assisted in placing 60 students in internship experiences of 350 hours each.

d. **Ms. Erin Trine**, MA, NIC, ED: k-12, is a nationally certified interpreter and interpreter educator, who worked full-time in educational settings for three years. She is dedicated to advancing the interpreting field both locally and internationally to better serve consumers. Ms. Trine has studied in cross-cultural contexts and her research has included cross-cultural considerations. She has been a full-time faculty member at WOU since 2014. Ms. Trine currently teaches in the undergraduate and graduate interpreting programs and coordinates the undergraduate interpreting program at WOU. Her master’s thesis focused on a case study of an Arabic/Jordanian Sign Language interpreter. She is currently collaborating with four other authors on a book focused on educational interpreting, expected publication is 2019. She served as an online facilitator for the RID 2017 LEAD Together Conference.

e. **Ms. Vicki Darden**, MA, CI, CT, NAD IV - Advanced, has been a Visiting Assistant Professor at Western Oregon University since 2015, serving as adjunct faculty from 2005 – 2015. Ms. Darden is completing a Ph.D. in Education with an emphasis in Educational Technology through Walden University. She holds a Master of Arts in Interpreting Studies with an emphasis in Teaching Interpreting, and a Bachelor of Science in ASL/English interpreting with a minor in Anthropology, both from WOU. Ms. Darden has served on the boards of state RID chapters as Secretary, Vice President, President, and Past President. She was one of the authors of RID’s Standard Practice Paper on interpreting in Video Relay Service settings and continues scholarship in the use of technology for fostering collegiality and collaboration in online interpreter education. She served as a facilitator at the RID 2017 LEAD Together Conference.

e. **Adequacy of faculty resources – full-time, part-time, adjunct.**

Dr. Elisa Maroney	full-time, tenured professor
Amanda R. Smith	full-time, tenured professor
Vicki Darden	full-time, non-tenure track faculty
Sarah Hewlett	full-time, non-tenure track faculty
Erin Trine	full-time, non-tenure track faculty

f. Other staff

a. Sarah Hewlett, teaches in the program but also serves as the Placement and Outreach Coordinator for the interpreting programs networking and establishing relationships with community partners (in Oregon and beyond) allowing students to intern across the country.

g. Adequacy of facilities, library, and other resources.

a. The Division of Deaf Studies and Professional Studies recently moved into the new Richard Woodcock Education Center. The building features 20 classrooms, numerous conference rooms and a digital production studio space. Each classroom is equipped with the full array of today's state of the art technology (e.g., projectors, document cameras, sound system, RF assistive listening technology). A number of classrooms also house Smartboard interactive monitors, video conferencing, and additional induction loop assistive listening systems.

There are two Mac labs and one PC lab, each with 24 computers, with one of these labs designated as a language lab. The digital production space has a Tricaster video switcher with virtual set capabilities, studio quality lighting, three professional studio cameras, and video streaming capabilities. Four classrooms have the ability to remotely connect the cameras to the digital production studio.

WOU's Hamersly Library is representative of a respected, accredited university library. It holds over 900 items in the area of deafness/hearing loss, subscribes to 15 related journals, and participates in the Summit system which allows students access to an additional 8,000 items. WOU has available, among others, meeting rooms, cafeterias, a motor pool, a new health and wellness fitness center, television studio, dormitory facilities, and other services that directly or indirectly facilitate the operation of the Interpreting Studies program. The University maintains a fully equipped audiology lab which is available to students. One very popular feature on the WOU campus is the new Leadership in Energy and Environmental Design (LEED) Platinum Ackerman Hall, which houses a dedicated floor where both Deaf and Hearing students live and interact in a signing environment.

h. Anticipated start date.

Pending approval by HECC and NWCCU, Fall 2019

2. Relationship to Mission and Goals

a. Manner in which the proposed program supports the institution's mission, signature areas of focus, and strategic priorities.

"Western Oregon University creates lasting opportunities for student success through transformative education and personalized support." This is the mission of WOU. This program aligns by engaging with pre-interpreting students much earlier in their educational journey, optimizing advising, growth, and appropriate career path choices. The institutional missions include the following that this program aligns with:

- a. 1.1.3 Strengthen programs that support graduates' career, professional, and graduate school preparedness
- b. 1.3.2 Improve curriculum based on effective assessment of student learning outcomes.
- c. 1.3.3 Support curricular innovation and accountability.
- d. 1.4.1 Improve academic advising for all students.
- e. 4.3 Promote high-quality, diverse and innovative models of program delivery that enhance both undergraduate and graduate student access and achievement.
- f. 3.1.1 Adopt experiential learning guidelines and align high-impact practices with these guidelines.
- g. 3.2.4 Create and enhance educational partnerships with local communities, particularly for underrepresented student groups.
- h. 3.4.1 Enhance diversity of university community as a matter of institutional priority and an integral component of academic success.

b. The proposed degree program exemplifies many of these institutional priorities. Faculty are utilizing data collected and analyzed to make improvements in curriculum to lead to increased quality of student learning outcomes. Additionally, with the recruitment of students from underrepresented groups is an innovative way of recruiting to increase the diversity of the program and the university. The program design incorporates a number of observation, practice, and reflection strategies to take place over a 4-5 year period of time engaging with the community at large - both hearing, English speakers and Deaf ASL users to learn communication patterns and cultural norms in situ.

b. Manner in which the proposed program contributes to institutional and statewide goals for student access and diversity, quality learning, research, knowledge creation and innovation, and economic and cultural support of Oregon and its communities.

- a. HECC identifies the following initiatives for the state of Oregon higher education industry:
 - 1. Goal-setting: sharpening state higher education goals in specific areas, including for working-age adults, and better reporting our progress towards meeting them.
 - 2. Public College and University Funding: supporting sustainable state funding linked to student success.
 - 3. Pathways: simplifying and aligning student pathways from cradle to career.
 - 4. Student Support: enhancing student success, safety, and completion.
 - 5. College Affordability: limiting student costs for attending college in Oregon.
 - 6. Economic and Community Impact: contributing to prosperous workforce, economy, and communities.
- b. The proposed program contributes a more simplified and direct pathway between high school graduation and degree completion by directly educating and providing program advising to freshmen and each class along the way. Additionally, this will enhance student success by providing opportunities earlier in their university experience to determine if interpreting is a fit for them and if they are a fit for interpreting. This will limit the amount of unnecessary credits taken toward degree completion. This will also reduce the number of students who reach their junior year but are not accepted into the program, who then have to change majors and redirect

their credits, likely having to take additional credits to complete their degree. Finally, the proposed program will increase the quality and quantity of interpreters available for work in the state of Oregon. This impacts not only the workforce of interpreters, but will also positively impact the workforce made up of Deaf/hard of hearing Oregonians, more and higher quality access to the workforce will be good for many citizens.

c. Manner in which the program meets regional or statewide needs and enhances the state's capacity

i. improve educational attainment in the region and state;

a. One challenge that the ASL/English interpreting program has faced over the years, is students who have planned and worked for 3 years in their academic career applying to enter the interpreting program and not being accepted. This throws off their trajectory and time to graduate. There are often extraneous and unnecessary credits taken in this pursuit that go unused when changing majors and/or have delayed completion of another degree option. In response to this challenge and the data we have collected, we believe that becoming engaged with pre-interpreting students in their first year will allow them to have a feel for the profession and do self-selection of continuing or not, as well as allow faculty relationships to more effectively advise for efficient degree completion.

ii. respond effectively to social, economic, and environmental challenges and opportunities;

There is a significant shortage of quality interpreters to serve Deaf citizens in the state of Oregon and the nation at large. This shortage results in compromised services in high stakes areas such as k-12 education, postsecondary education, business, medical arenas, legal system, and more. The consequences are compromised quality of life for Deaf Oregonians as access to education, work, and health care are limited by the skill set of the assigned interpreter. There are currently no laws regulating interpreters in other settings than k-12 education. The law in Oregon is that interpreters must have a minimum of a 3.5 on a national Educational Interpreter Performance Assessment exam in order to work. The longitudinal study completed by Dr. Maroney and Ms. Smith indicates that graduates of WOU's ASL/English Interpreting program since average 3.39 on this assessment. The academic program is nationally accredited by the Commission on Collegiate Interpreter Education and yet sufficient numbers of qualified interpreting students are not graduating to meet the needs in the state and region. We need to look at interpreter education from a completely different angle. We need to start earlier, with a different lense of experience, community engagement, and becoming familiar with new settings, people, language use, and communication styles.

WOU's Regional Resource Center on Deafness recently conducted an Oregon Community Needs Assessment specific to the Deaf/HH population. This research was conducted by principal investigator Dr. Denise Thew Hackett (of the Rehabilitation and Mental Health Counseling program here at WOU). The findings are informative for the state of Oregon (in addition to

many, many others), showing frequent frustration or lack of access to state services due to “lack of interpreter availability” and/or “finding qualified interpreters.” The state of Oregon needs more interpreters, and more interpreters of quality sufficient to meet the needs of the range of Deaf/HH citizens from accessing state services to being able to navigate very specific, technical jargon with Deaf/HH individuals in the workforce.

iii. address civic and cultural demands of citizenship.

a. Being an interpreter, by definition, includes familiarity with and fluency in another language and culture than one’s own. This contributes to a citizenry that is able to communicate cross-culturally in at least 2 languages/cultures, oftentimes there is an extension of this skill in being curious about how to communicate with other unknown languages/cultures. Additionally, as mentioned above, the higher quality services provided, the more fully Deaf/hard of hearing citizens engage in, contribute to, and prosper from the Oregon economy as autonomous individuals.

3. Accreditation

a. Accrediting body or professional society that has established standards in the area in which the program lies, if applicable.

a. Commission on the Collegiate Interpreter Education (CCIE). The current undergraduate program is CCIE accredited.

b. Ability of the program to meet professional accreditation standards. If the program does not or cannot meet those standards, the proposal should identify the area(s) in which it is deficient and indicate steps needed to qualify the program for accreditation and date by which it would be expected to be fully accredited.

a. The current program is CCIE accredited, faculty have served as president of CCIE, developer of standards, and current site reviewers. The new program developed is mindful of not only CCIE standards but also current research done by faculty, graduate students and the field at large.

c. If the proposed program is a graduate program in which the institution offers an undergraduate program, proposal should identify whether or not the undergraduate program is accredited and, if not, what would be required to qualify it for accreditation.

N/A

d. If accreditation is a goal, the proposal should identify the steps being taken to achieve accreditation. If the program is not seeking accreditation, the proposal should indicate why it is not.

a. The current requirement is 3 graduating classes before we are able to apply for accreditation. We will be on track to apply upon completion of the third cohort.

4. Need

a. Anticipated fall term headcount and FTE enrollment over each of the next five years.

	Headcount/SCH projections, first 5 years of program				
	2018-19	2019-20	2020-21	2021-22	2022-23
Cohort 1 (18-19)	120	75	50	25	
Credits	5	5	15	32	
SCH	600	375	750	800	
Cohort 2 (19-20)	0	120	75	50	25
Credits		5	5	15	32
SCH		600	375	750	800
Cohort 3 (20-21)	0	0	120	75	50
Credits			5	5	15
SCH			600	375	750
Cohort 4 (21-22)	0	0	0	1	75
Credits				20	5
SCH				5	5
Cohort 5 (22-23)	0	0	0	0	120
Credits					5
SCH					600
Total					
Headcount	120	195	245	270	270
Total SCH	600	975	1725	2525	2525

** these will be additional SCH through Year 4 while the existing BA in ASL/English Interpreting is being phased out. Starting Year 5, the transition will be complete and the SCH and FTE will level out and sustain at that level.

b. **Projections** are based on the current estimate of pre-interpreting students at Western Oregon University and attrition rates over the last few years. Those that do not continue in the Interpreting degree, may change majors to ASL Studies, Interdisciplinary Studies or another degree pathway. Faculty teaching in this program will also teach in the MA in Interpreting Studies: Theory & Practice and Advanced/Teaching Emphasis, thus FTE numbers over the next 6 years (including all programs and the phase out of the ASL/EI program) are as follows:

FTE	Fall	Winter	Spring	Total FTE
Yr 1	5.83	6.83	6.58	6.42
Yr 2	6.58	6.33	6.08	6.33
Yr 3	6.75	5.83	5.83	6.14
Yr 4	7.58	7.67	7.42	7.56
Yr 5	6.42	6.67	6.58	6.56
Yr 6	5.83	5.75	6.08	5.89
			Average FTE	6.48

** this table reflects the FTE of existing BA, MAIS, and proposed BA programs over the next 6 years.

b. **Expected degrees/certificates produced over the next five years.**

	Graduate projections, first 6 years of the program				
	2018-2021	2021-22	2022-23	2023-24	2024-2025
Cohort 1 (18-19)		25			
Cohort 2 (19-20)			25		
Cohort 3 (20-21)				25	
Cohort 4 (21-22)					25
Cohort 5 (22-23)					
Cohort 6 (23-24)					

b. This is graduation/completion of the undergraduate portion of the program. The number of students who continue on to the MA in Interpreting Studies: Theory & Practice, will be close to 20-25 of those graduates.

c. Characteristics of students to be served (resident/nonresident/international; traditional/nontraditional; full-time/part-time, etc.).

a. Students in previous years have been 50/50 resident and non-resident, with non-resident’s primarily from Washington or other WUE states. The program is designed to be completed full-time by traditional and non-traditional students.

d. Evidence of market demand.

a. In 2016, Dr. Denise Thew Hackett (Western Oregon University) undertook a research project funded by the State of Oregon to complete a [Community Needs Assessment](#) to identify the

social, health, and educational disparities experienced by the Deaf and Hard of Hearing Communities. Her findings indicate that the quantity and quality of interpreters in the state is significantly lacking. This lack of quantity and quality means that many interpreting jobs go unfilled resulting in Deaf/HH Oregonians unable to see doctors, visit with social security offices, receive vocational rehabilitation services, connect with co-workers, and participate fully in job interviews, to name a few of the impacts. Additionally, there is a lack of interpreters working in k-12 settings which results in Deaf/HH students in mainstream schools going without services at times and at other times having less than quality services provided to access their education. There are many job openings and, again, unfilled jobs both in the freelance market and the k-12 staff market.

Western Oregon University is also the only BA level interpreter education program in the northwest, the students we prepare end up serving Deaf/HH –communities in neighboring states as well as Oregon. The circumstances in these neighboring states are similar in that there are insufficient numbers and quality of interpreters to meet the needs of the ever-advancing Deaf/HH communities. There are only 2 other 2 year programs in the northwest that graduate a few students each year. WOU is the biggest feeder of interpreters into the market for most of the northwest.

e. If the program’s location is shared with another similar Oregon public university program, the proposal should provide externally validated evidence of need (e.g., surveys, focus groups, documented requests, occupational/employment statistics and forecasts).

a. Not applicable. No other Oregon public universities offer this program in the state.

f. Estimate the prospects for success of program graduates (employment or graduate school) and consideration of licensure, if appropriate. What are the expected career paths for students in this program?

a. Immediate prospects would be continuation with schooling here at WOU by entering the MA in Interpreting Studies: Theory & Practice track. Upon completion of that program, career and employment path includes interpreting in multiple areas - freelance, education, community, staff, etc. If students exit at the BA level, there will be a more elusive employment path, and not advisable - at this level of competence, they could not work independently as an interpreter but could work with interpreting agencies or other businesses affiliated with the Deaf and/or interpreting fields in some way.

5. Outcomes and Quality Assessment

Mission: To improve the quality and quantity of pre-interpreting professionals who will serve & collaborate with community members and professionals by educating students in communication, human relations, and ethical reasoning.

a. Expected learning outcomes of the program.

a. Students will:

1. Demonstrate the academic foundation and world knowledge essential to understand and navigate the world around them.
2. Develop critical analysis skills including: situational assessment; ethical reasoning; cultural intelligence lens, and research methodologies.
3. Demonstrate collaborative and cooperative abilities when engaging with colleagues, community members, and other teams.
4. Integrate academic foundation, world knowledge, critical analysis skills, communication skills, and language fluency by engaging meaningfully, collaboratively, and intentionally in communicative interactions.

b. Methods by which the learning outcomes will be assessed and used to improve curriculum and instruction.

1. Program learning outcomes will be assessed by evaluating samples of student work including but not limited to: spoken/signed & write communication, situational analyses, and interpersonal competence using rubrics developed based on evidence-based best practices in interpreting.

b. Nature and level of research and/or scholarly work expected of program faculty indicators of success in those areas.

- a. Tenured and tenure-track faculty in the Interpreting Studies program have appointments in the division of Deaf Studies & Professional Studies, and are expected to meet the scholarly standards of the division. Per the WOU-WOUFT collective bargaining agreement, scholarly expectations of faculty at WOU are expressed through the Boyer model of scholarship, where faculty can demonstrate scholarly achievement in the scholarship of discovery, application, integration and teaching & learning. All tenure-track WOU faculty are expected to maintain engagement in at least one of these modes of scholarship.

6. Program Integration and Collaboration

a. Closely related programs in this or other Oregon colleges and universities.

- a. This program is closely related and would serve as a feeder to the Master of Arts in Interpreting Studies, both the Interpreting Studies: Theory & Practice track and the advanced/teaching track. Additionally, this program would have students who are in ASL Studies program classes as well. Faculty will continue to work together for effective and efficient instruction.

b. Ways in which the program complements other similar programs in other Oregon institutions and other related programs at this institution. Proposal should identify the potential for collaboration.

- a. There are no similar program in other Oregon institutions, nor anywhere west of Washington, D.C. and Florida..

c. If applicable, proposal should state why this program may not be collaborating with existing similar programs.

WOU continues to collaborate with Portland Community College.

d. Potential impacts on other programs.

7. External Review

If the proposed program is a graduate level program, follow the guidelines provided in External Review of New Graduate Level Academic Programs in addition to completing all of the above information.

Instructions on Budget Outline form

1. Whose viewpoint?

The Budget Outline is intended to show the budgetary impact resulting from offering the new program. This table should be completed from the viewpoint of the budgetary unit that will be responsible for the program. Determine what the budgetary unit will be doing (in terms of new or additional activities) that it is not now doing and show what these activities will cost — whether financed and staffed by shifting of assignments within the budgetary unit; reallocation of resources within the institution; special appropriation of the legislature; or gift, grant, or other funds.

2. No additional resources needed?

If the program is simply a rearrangement of courses already being offered, relying on access to library resources available for other programs, with no requirements for new or additional specialized facilities, equipment, or technology, and with no increase or decrease in students served by the budgetary unit responsible for the program, the budgetary impact would be near zero and should be so reported in the table.

3. Additional resources needed?

If FTE faculty or support staff assigned to the budgetary unit must be increased to handle an increased workload as a result of the new program (or to provide added competencies), indicate the total resources required to handle the new activities and workload (e.g., additional sections of existing courses) by specifying: (1) how much of this total figure is from reassignment within the budgetary unit (Column A), and (2) how much is from resources new to the budgetary unit (Columns B-E). Please provide line item totals in Column F.

Budget Outline Form: Year 1

Estimated Costs and Sources of Funds for Proposed Program

Total new resources required to handle the increased workload, if any. If no new resources are required, the budgetary impact should be reported as zero

Institution: Western Oregon University
 Program: BA Interpreting Studies: Theory

Academic Year: 2020-2021

	Column A	Column B	Column C	Column D	Column E	Column F
	From Current Budgetary Unit	Institutional Reallocation from Other Budgetary Unit	From Special State Appropriation Request	From Federal Funds and Other Grants	From Fees, Sales and Other Income	LINE ITEM TOTAL
Personnel						
Faculty (Include FTE)	41, 556 (1.0 NTT)					41,556
Graduate Assistants (Include FTE)						
Support Staff (Include FTE)						
Fellowships/Scholarships						
OPE						
Nonrecurring						
Personnel Subtotal						
Other Resources						
Library/Printed						

Library/Electronic						
Supplies and Services						
Equipment						
Other Expenses						
Other Resources Subtotal						0
Physical Facilities						
Construction						
Major Renovation						
Other Expenses						
Physical Facilities Subtotal						0
GRAND TOTAL						41,556

Budget Outline Form: Year 2

Estimated Costs and Sources of Funds for Proposed Program

Total new resources required to handle the increased workload, if any. If no new resources are required, the budgetary impact should be reported as zero

Column A	Column B	Column C	Column D	Column E	Column F
From Current Budgetary Unit	Institutional Reallocation from Other Budgetary Unit	From Special State Appropriation Request	From Federal Funds and Other Grants	From Fees, Sales and Other Income	LINE ITEM TOTAL

Personnel						
Faculty (Include FTE)	41, 556 (1.0 NTT)					41, 556
Graduate Assistants (Include FTE)						
Support Staff (Include FTE)						
Fellowships/Scholarships						
OPE						
Nonrecurring						
Personnel Subtotal						41, 556
Other Resources						
Library/Printed						
Library/Electronic						
Supplies and Services						
Equipment						

Other Expenses						
Other Resources Subtotal						
Physical Facilities						
Construction						
Major Renovation						
Other Expenses						
Physical Facilities Subtotal						
GRAND TOTAL						41,556

Budget Outline Form: Year 3

Estimated Costs and Sources of Funds for Proposed Program

Total new resources required to handle the increased workload, if any. If no new resources are required, the budgetary impact should be reported as zero

Column A	Column B	Column C	Column D	Column E	Column F
From Current Budgetary Unit	Institutional Reallocation from Other Budgetary Unit	From Special State Appropriation Request	From Federal Funds and Other Grants	From Fees, Sales and Other Income	LINE ITEM TOTAL

Personnel						
Faculty (Include FTE)	41,556 (1.0 NTT)					41,556

Graduate Assistants (Include FTE)						
Support Staff (Include FTE)						
Fellowships/Scholarships						
OPE						
Nonrecurring						
Personnel Subtotal						41,556
Other Resources						
Library/Printed						
Library/Electronic						
Supplies and Services						
Equipment						
Other Expenses						
Other Resources Subtotal						
Physical Facilities						
Construction						
Major Renovation						
Other Expenses						

Physical Facilities Subtotal						
GRAND TOTAL						41,556

Budget Outline Form: Year 4

Estimated Costs and Sources of Funds for Proposed Program

Total new resources required to handle the increased workload, if any. If no new resources are required, the budgetary impact should be reported as zero

Column A	Column B	Column C	Column D	Column E	Column F
From Current Budgetary Unit	Institutional Reallocation from Other Budgetary Unit	From Special State Appropriation Request	From Federal Funds and Other Grants	From Fees, Sales and Other Income	LINE ITEM TOTAL

Personnel						
Faculty (Include FTE)	83,112 (2.0 FTE)					83,112
Graduate Assistants (Include FTE)						
Support Staff (Include FTE)						
Fellowships/Scholarships						
OPE						

Nonrecurring						
Personnel Subtotal						83,112
Other Resources						
Library/Printed						
Library/Electronic						
Supplies and Services						
Equipment						
Other Expenses						
Other Resources Subtotal						
Physical Facilities						
Construction						
Major Renovation						
Other Expenses						
Physical Facilities Subtotal						
GRAND TOTAL						83,112



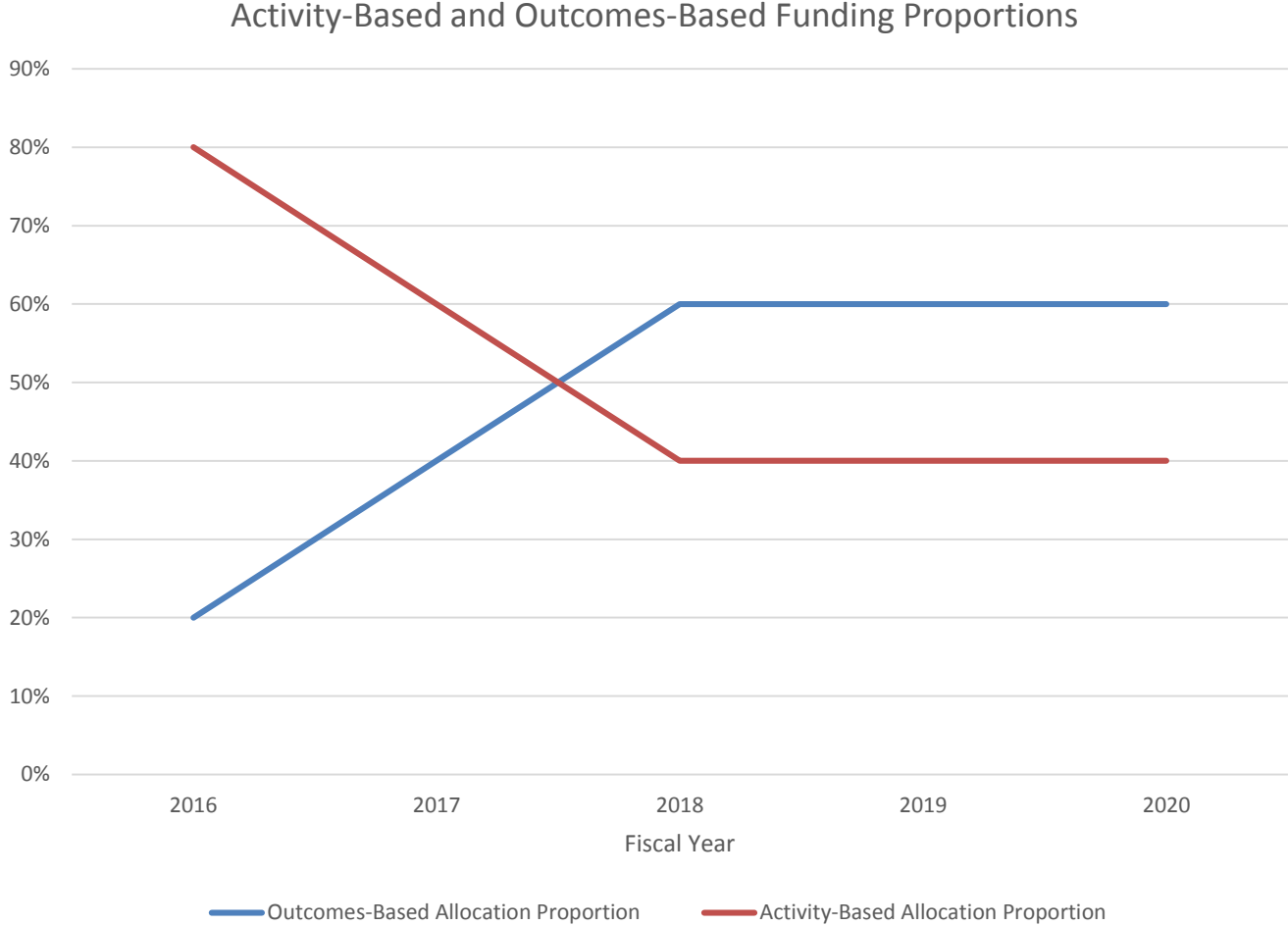
Tuition and Fee Advisory Committee

December 6, 2018



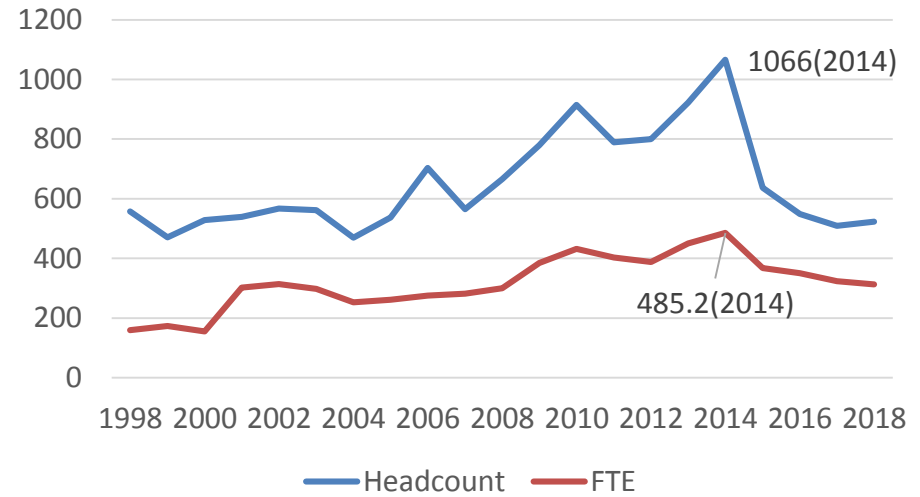
Western Oregon
UNIVERSITY

Student Success and Completion Model

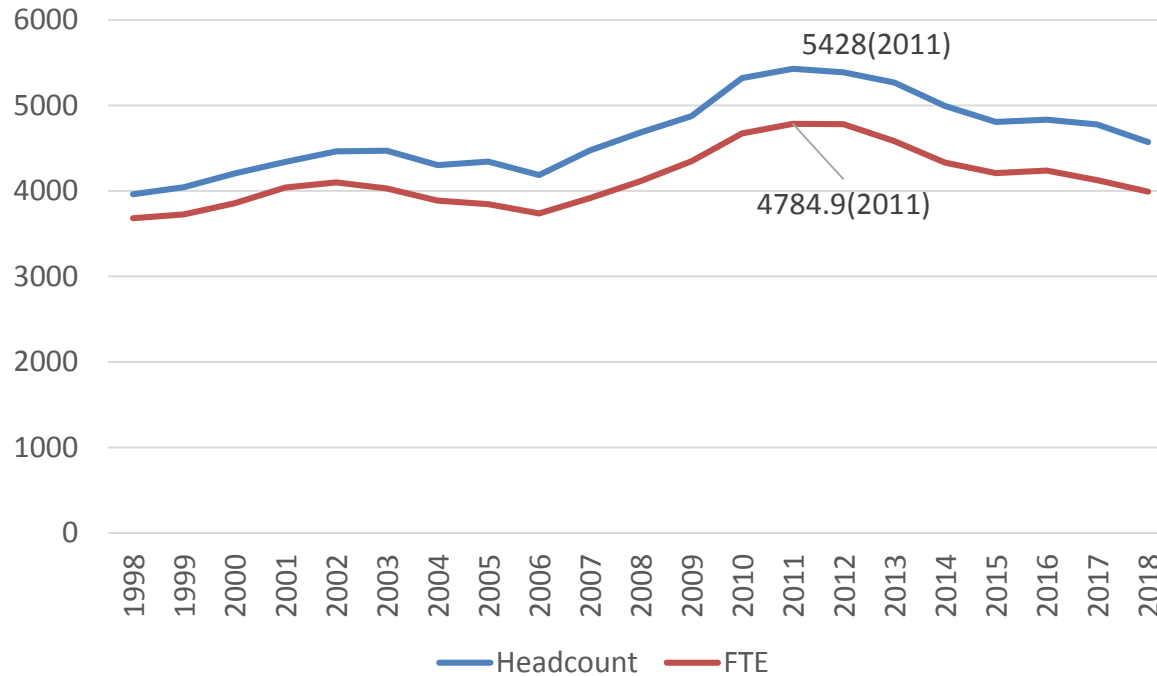


Enrollment

Graduate Fall Enrollment

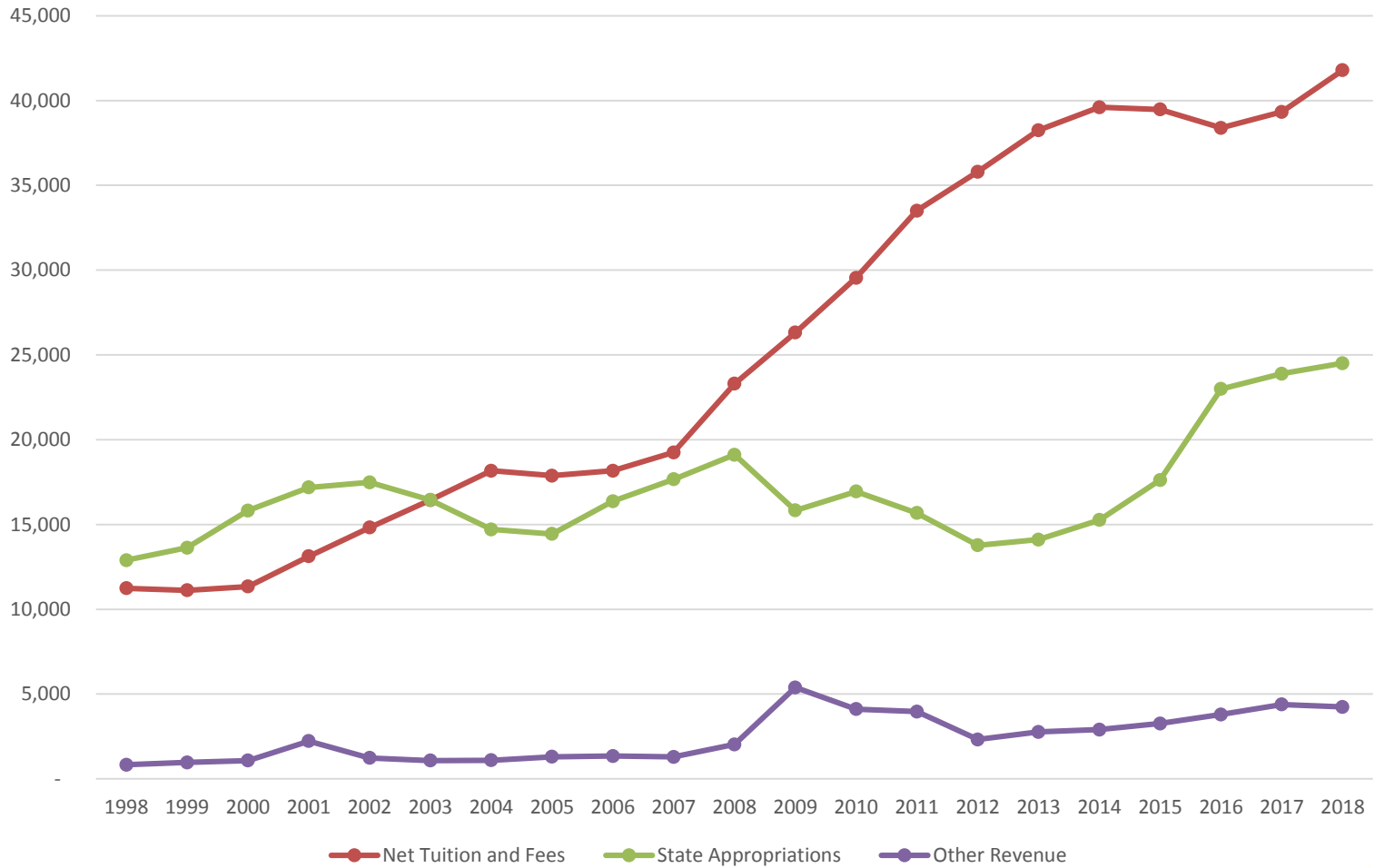


Undergraduate Fall Enrollment



Revenues

Tuition and State Appropriations (in thousands)



Education and General Fund

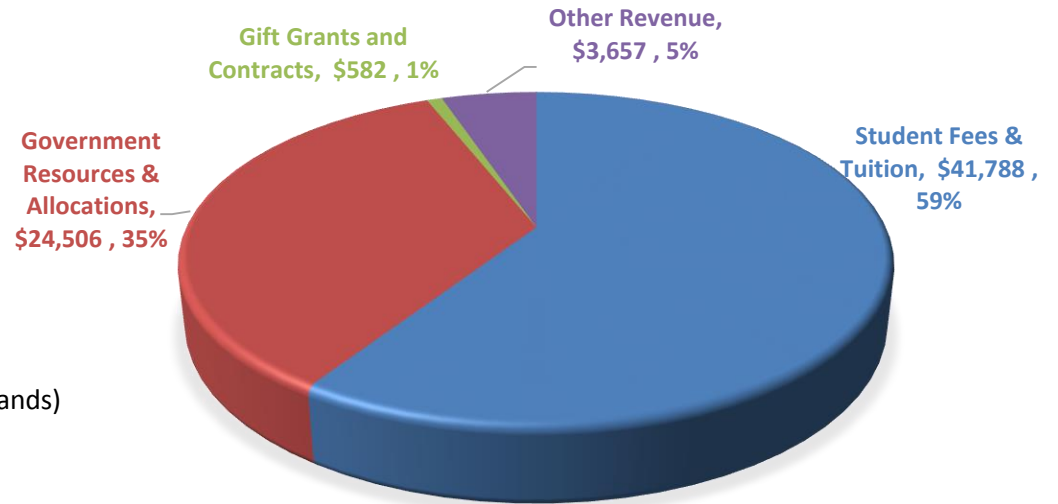
Education and General Fund Operations (in thousands)

	Year-end	Year-end	Variance		Adopted	Variance	
	Actuals	Actuals	FY17 to FY18	FY18 to FY19 Budget		2019 Budget	\$ Change
	6/30/2017	6/30/2018	\$ Change	% Change		\$ Change	% Change
Education & General							
Student Fees & Tuition	39,328	41,788	2,460	6.26%	41,870	82	0.20%
Government Resources & Allocations	23,888	24,506	618	2.59%	25,007	501	2.04%
Gift Grants and Contracts	652	582	(70)	-10.68%	584	2	0.31%
Other Revenue	3,731	3,657	(74)	-1.99%	3,892	235	6.44%
Total Revenues	67,598	70,533	2,935	4.34%	71,353	820	1.16%
Personnel	54,471	55,212	742	1.36%	60,055	4,843	8.77%
Service & Supplies	7,383	8,391	1,007	13.64%	8,679	289	3.44%
Capital Expense	454	261	(194)	-42.61%	203	(58)	-22.23%
Total Expenses	62,308	63,863	1,555	2.50%	68,937	5,074	7.94%
Interfund Transfers	4,771	3,999	(772)	-16.18%	3,341	(658)	-16.45%
Total Expenses and Transfers	67,079	67,862	783	1.17%	72,278	4,416	6.51%
Net Revenues less Expenses	519	2,670			(925)		
Additions/Deductions to Fund Balance	(490)	0			0		
Fund Balance at the Beginning of the Year	11,294	11,323			13,993		
Fund Balance at the End of the Year	11,323	13,993			13,068		
Fund Balance as a Percentage of Revenues	16.75%	19.84%			18.31%		



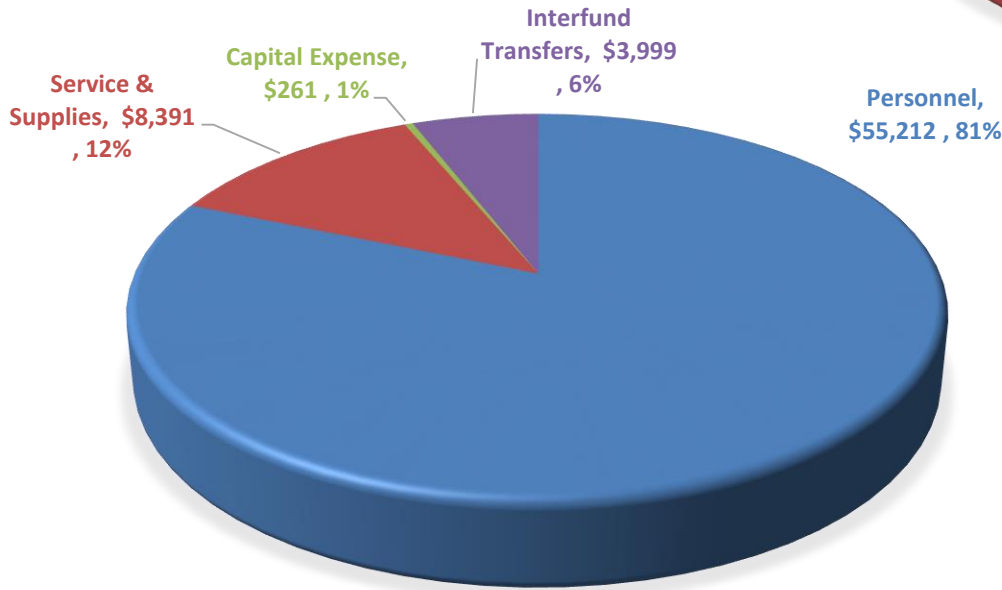
FY18 Revenues and Expenses

REVENUES (in thousands)



Total: \$70,533

EXPENSES (in thousands)

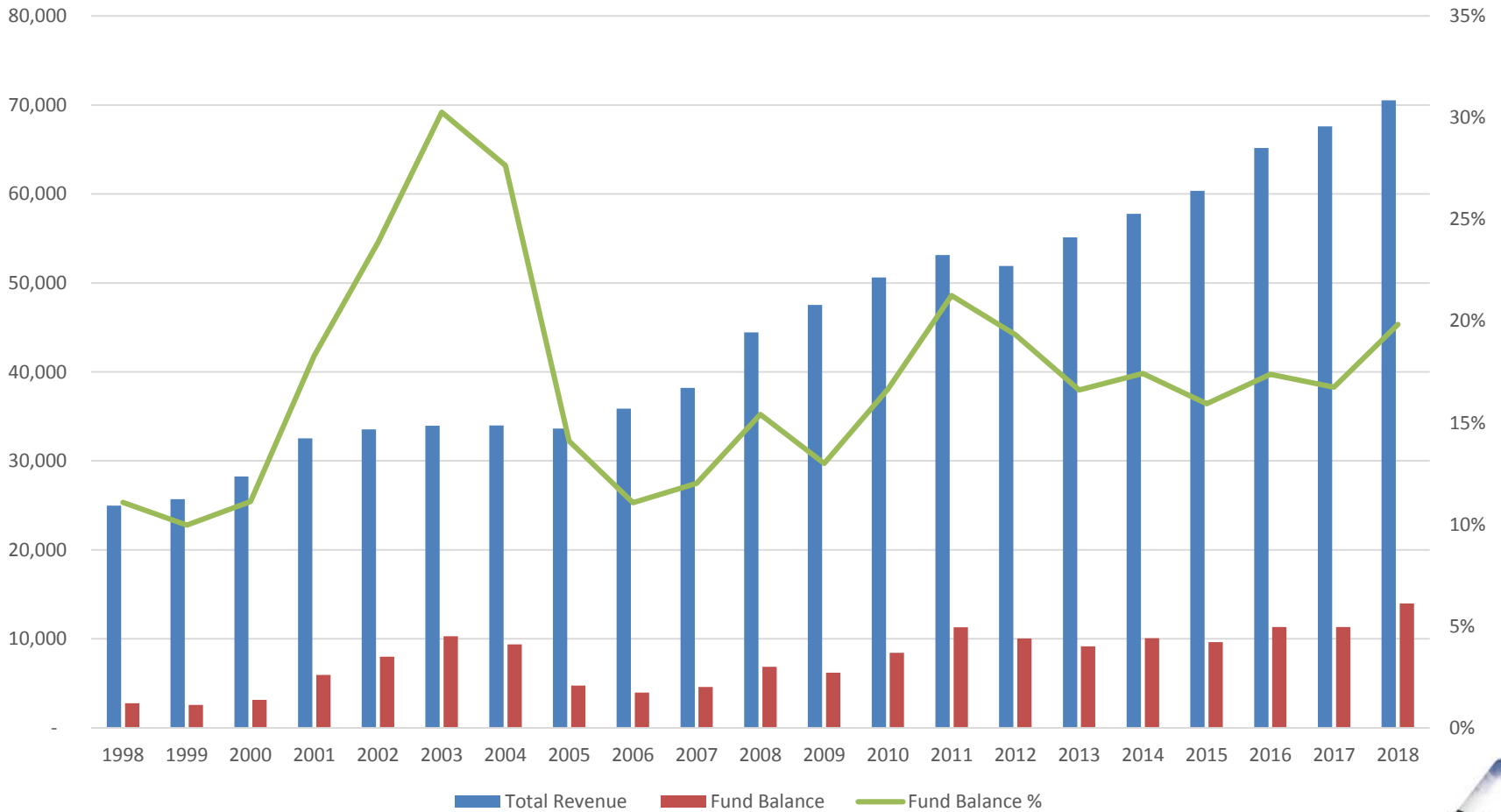


Total: \$67,863



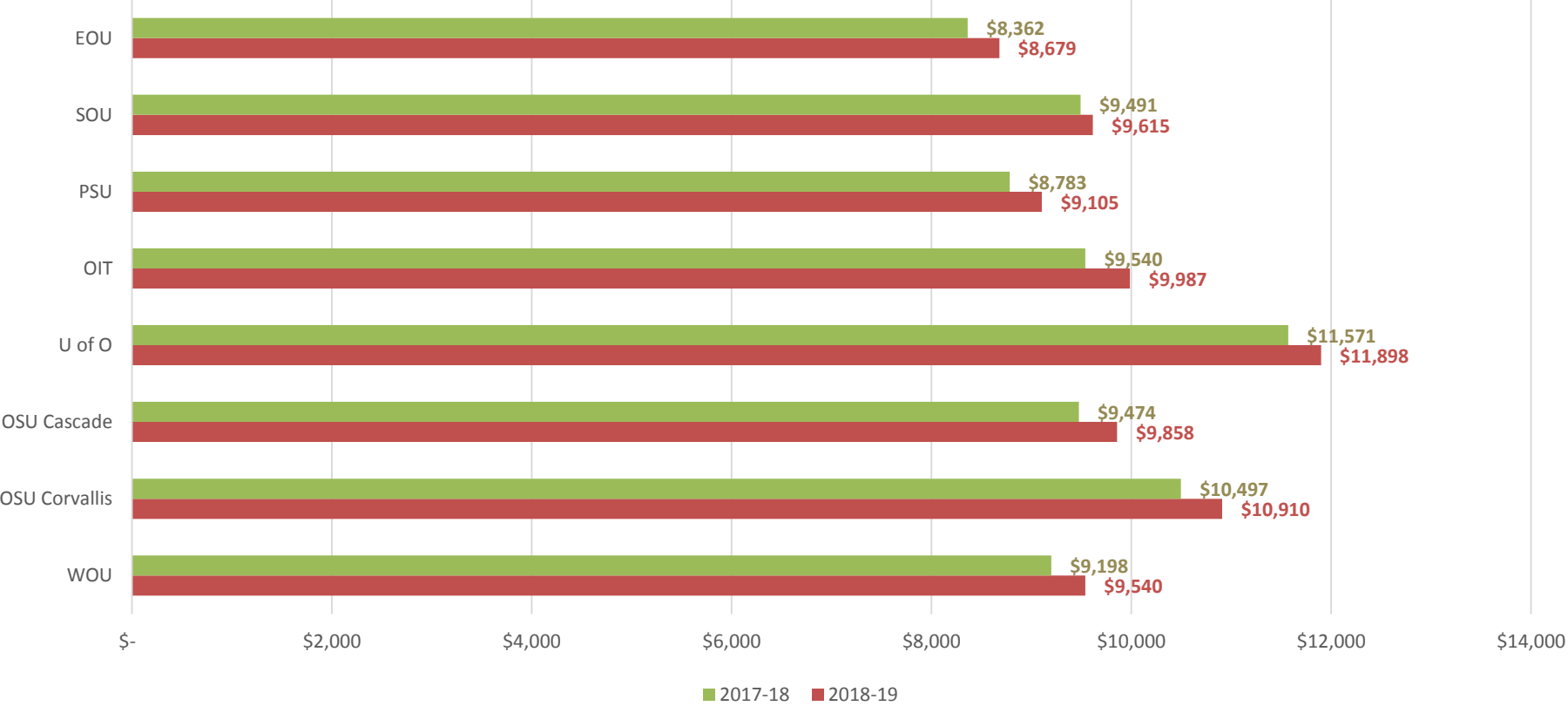
Historical Revenue and Fund Data

20 Year Historical Revenue and Fund Data (in thousands)



Oregon Universities Comparison

Resident Undergrad Tuition and Fees



WOU Historical Tuition Rates

Historical Tuition per Credit Rates

