



# POLICIES, REGULATIONS, AND FINANCIAL REVIEW



SUBMITTED AUGUST 2025

## Table of Contents

Mission Fulfillment Executive Summary.....	2
Eligibility Requirements.....	4
Standard Two: Governance, Resources, and Capacity.....	5
Governance.....	5
Standard 2.A.1.....	5
Standard 2.A.2.....	8
Standard 2.A.3.....	9
Standard 2.A.4.....	10
Academic Freedom.....	13
Standard 2.B.1.....	13
Standard 2.B.2.....	13
Policies and Procedures.....	14
Standard 2.C.1.....	14
Standard 2.C.2.....	16
Standard 2.C.3.....	18
Standard 2.C.4.....	20
Institutional Integrity.....	22
Standard 2.D.1.....	22
Standard 2.D.2.....	23
Standard 2.D.3.....	26
Financial Resources.....	27
Standard 2.E.1.....	27
Standard 2.E.2.....	28
Standard 2.E.3.....	30
Human Resources.....	31
Standard 2.F.1.....	31
Standard 2.F.2.....	33
Standard 2.F.3.....	34
Standard 2.F.4.....	36
Student Support Resources.....	37
Standard 2.G.1.....	37
Standard 2.G.2.....	43
Standard 2.G.3.....	44
Standard 2.G.4.....	44
Standard 2.G.5.....	47
Standard 2.G.6.....	48
Standard 2.G.7.....	51
Library and Information Resources.....	52
Standard 2.H.1.....	52
Physical and Technological Infrastructure.....	54
Standard 2.I.1.....	54
Moving Forward.....	59

## Mission Fulfillment Executive Summary

Founded in 1842, Willamette University was the first university established in the western United States, and is deeply integrated with the history of the Pacific Northwest. Over the last two centuries, the University has grown and evolved to encompass two colleges and four graduate schools offering ten degree types at campuses in both Salem and Portland—Oregon’s state capital and largest city, respectively.

A significant portion of this change has occurred even since Willamette’s 2019 Self-Study. In 2021, a merger with the Pacific Northwest College of Art combined the University’s strong legacy of liberal arts and professional education with the region’s foremost art and design school, and added fifteen BFA, MFA, and MA programs to Willamette’s offerings. Also in 2021, Willamette launched a BS in business administration with courses taught by faculty in the Atkinson Graduate School of Management. In 2023, the University established a School of Computing and Information Sciences, which offers MS degrees in computer science and data science, and whose faculty contribute to bachelor’s degrees in computer science, data science, and statistics in Willamette College.

These new programs have necessitated substantial curricular and structural changes in the University's academic and operational units. Rather than a one-faculty-per-unit structure, many of Willamette’s faculties now contribute to the curriculum of multiple colleges or schools (see Image 1). Mirroring this trend, the University’s administrative and support staff increasingly serve student populations across the University, although some unit-level practices and staffing structures remain.

### Willamette University

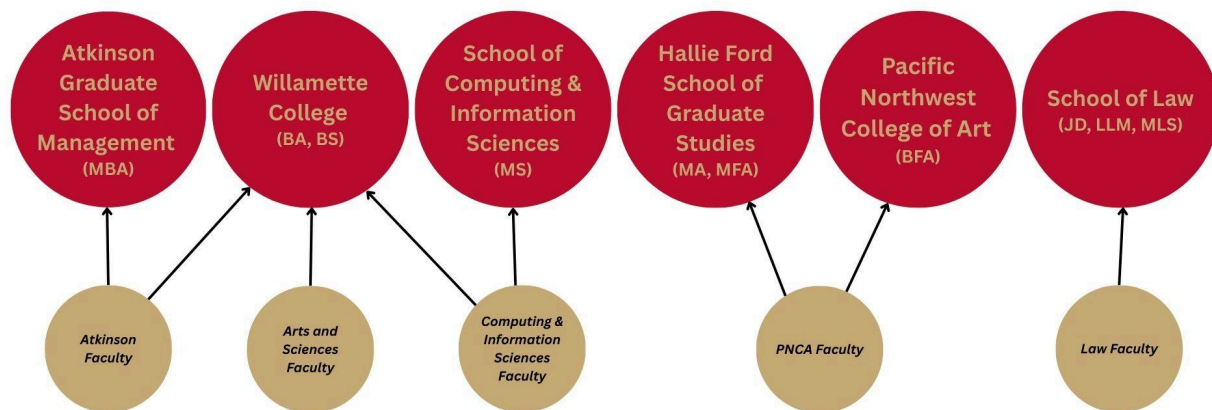


Image 1. Willamette University's Academic Unit and Curricular Governance Map

This growth and adaptation are a reflection of the recommendations from Willamette’s 2019 Self-Study to address strategic position and enrollment challenges, as well as the goals laid out in the [2022 Strategic Plan](#). Together with Willamette’s mission to “prepare

graduates to turn knowledge into action and to lead lives of achievement, contribution, and meaning,” the Strategic Plan sets a goal of establishing Willamette’s place as the Northwest’s leading liberal arts university through a set of complementary strategic positioning statements and objectives that guide its work:

- **Meet lifelong needs for professional and liberal education** by building a portfolio of undergraduate, early-career graduate, and non-residential professional and graduate programs
- **Develop a deep engagement with the Pacific Northwest** by strengthening relationships with regional employers and connecting classroom learning with the region’s needs
- **Build an integrated university responsive to the needs of the 21st century** by creating more cross-functional academic and administrative structures that allow us to be nimble in developing programs and offerings that best serve our students
- **Strengthen academic and co-curricular programs** through distinctive offerings that address complex, timely topics through interdisciplinarity and experiential learning, and that place an increased emphasis on student support and success
- **Build enrollment and increase revenues** through integrated enrollment management functions, improved retention, and strategic program investment
- **Reorganize to serve a larger, more complex, student-focused university** by promoting greater operational integration, policy alignment, and business processes to ensure University resources are allocated in alignment with its strategic efforts

This framework is attached to a series of quantitative and qualitative metrics that are used by Willamette’s leadership to assess progress in advancing the University’s strategic goals. These metrics include:

- Narrative updates by the President to the Board of Trustees regarding progress toward advancing the goals laid out in the plan as well as updates and short-term operational objectives to advance the overall strategy.
- A set of Key Performance Indicators including metrics related to enrollment, retention, university finances, staff and faculty FTE, and facilities use and condition to assess Willamette’s academic and operational performance.
- Unit-level goals around enrollment, retention, graduation, accumulated debt, and post-graduate earnings that are benchmarked with regional and national peers and regularly reviewed by deans, VPs, and leadership.
- Updates from the President and his leadership cabinet to members of the campus community that share both large, university-level progress as well as unit- and division-level progress and activities that advance Willamette’s strategic goals.

These various metrics are regularly reviewed, refined, and shared among University leaders and campus faculty and staff. This ongoing review and refinement guides Willamette’s work in advancing its Strategic Plan and mission fulfillment, and lends to continuous improvement as part of ongoing operational and accreditation efforts.

## **Eligibility Requirements**

Willamette University asserts compliance with the NWCCU 2020 Eligibility Requirements.

## Standard Two: Governance, Resources, and Capacity

### Governance

#### Standard 2.A.1.

*The institution demonstrates an effective governance structure, with a board(s) or other governing body(ies) composed predominantly of members with no contractual, employment relationship, or personal financial interest with the institution. Such members shall also possess clearly defined authority, roles, and responsibilities. Institutions that are part of a complex system with multiple boards, a centralized board, or related entities shall have, with respect to such boards, written and clearly defined contractual authority, roles, and responsibilities for all entities. In addition, authority and responsibility between the system and the institution is clearly delineated in a written contract, described on its website and in its public documents, and provides the NWCCU accredited institution with sufficient autonomy to fulfill its mission.*

Guided by the University's [Articles of Incorporation](#) and [Bylaws](#), the Board of Trustees serves as the governing body responsible for advancing Willamette's strategic initiatives and institutional priorities. Willamette's Board holds fiduciary authority over all corporate functions of the University, establishes institutional policies, and ensures responsible stewardship of institutional resources. Additionally, the Board stays apprised of the evolving higher education landscape and partners with University administration to ensure Willamette's long-term viability and success.

#### *Board Composition*

Per the University's [Bylaws](#), Willamette's Board consists of not more than 60 regular voting members,<sup>1</sup> and its officers include the University president, chair, vice-chair, secretary, treasurer, and administrative secretary. The chair is the presiding officer and is elected by the Board; the chair holds office for a term of two years and may be re-elected for one additional term. Trustee candidates are recommended by the Board's Trusteeship committee and are elected at the spring meeting. Each trustee serves a three-year term and is eligible for re-election for five consecutive terms for a total of fifteen years. A trustee who has served at least four full terms may be considered for life trustee emeritus status, which grants them trustee privileges except for the right to vote or make motions.

There are designated seats for one Alumni Association appointed trustee as well as three United Methodist Church (UMC) trustees. The UMC-appointed trustees have been established in recognition of the long-standing relationship between the University and the UMC, and only two of these three positions have voting and motion-making privileges. The Board also includes a faculty and student representative from each of Willamette's schools and colleges. These individuals attend and participate in Board meetings and discussions (other than executive sessions), but do not have voting or motion-making privileges.

---

<sup>1</sup> Note that while the Bylaws allow for up to 60 trustees, there are typically far fewer; Willamette's Board currently comprises [29 trustees](#).

### *Board Committees and Roles*

The Board's Executive Committee includes the Board officers, the chairs of the Board's standing committees, and up to three at-large members. This Committee serves as an interim board between regular meetings, and has the authority to conduct University business as necessary on the Board's behalf with the following exceptions: the Executive Committee may not authorize distributions; approve or recommend dissolution, merger or the sale, pledge or transfer of all or substantially all of the University's assets; elect, appoint or remove Trustees; fill vacancies on the Board or on any of its committees; or adopt, amend or repeal the Articles of Incorporation or the Bylaws ([Bylaws](#), Section 3.1).

In addition to the Executive Committee, the Board is structured into seven additional committees: 1) Audit, Risk, and Compliance; 2) Advancement; 3) Academic Affairs & Enrollment; 4) Endowment; 5) Finance & Infrastructure; 6) Trusteeship; and 7) University Life. This structure follows a 2020 reorganization of the Board and its committees to reflect the centralization and integration of various University functions.

### *Board Member Training and Orientation*

The Board's Trusteeship Committee oversees an onboarding program for new members, which is implemented prior to their first official Board meeting in October. This program is designed to prepare new trustees for effective service, and includes the following topics:

- board structure
- shared governance in higher education
- institutional finance, higher education budgets, and financial reports
- philanthropy and trustees' role in supporting the University's fundraising efforts

Following their initial orientation, trustees receive continuing education through sessions at each meeting that ensure they are apprised of current issues in higher education. Each new Board member is also paired with an experienced trustee mentor who has completed at least one full term of service. Mentors help new trustees understand board dynamics, and create a supportive space for new trustees to ask questions, seek clarification, and build confidence in their role. New trustees are also assigned to board committees per their interests and professional expertise.

### *Board Meeting Structure*

Per the [Bylaws](#), Willamette's Board meets three times during the academic year in the fall, winter, and spring—with the spring meeting considered the Board's annual meeting. Special meetings of the Board may be called at any time. While there are small variations from year-to-year in response to external factors and organizational needs, the Board's meetings are generally structured around the following activities:

- Fall (October): tuition review for all schools
- Winter (February): faculty tenure approval; strategic issues retreat
- Spring (May): budget approval for the upcoming fiscal year; new trustee elections

### *Board Review and Evaluation of Policies*

The Board of Trustees reviews and updates policies and procedures through scheduled assessments and *ad hoc* reviews triggered by organizational changes or emerging needs. The Trusteeship Committee conducts annual bylaw reviews in conjunction with targeted assessments prompted by institutional changes, regulatory updates, or identified governance needs. Recent bylaw revisions have responded to significant institutional developments—such as the addition of new schools and corresponding governance structures, as well as modifications to the Board's committee structure.

The Board's Finance and Infrastructure Committee works with the Chief Financial Officer in her capacity as Board Treasurer to develop and refine budget-building processes and financial policies. This partnership ensures that budgetary procedures reflect both sound financial management principles and the Board's fiduciary responsibilities. The committee has developed budget guardrails and five-year financial forecasts that allow for informed decision-making and long-term financial planning. The Finance and Infrastructure Committee regularly reviews and updates these tools to ensure they remain relevant and responsive to institutional needs and external economic conditions.

### *Board Review and Evaluation of its Members*

The Board's Trusteeship Committee administers a trustee self-review every other year. With a focus on Board effectiveness and member engagement, this review evaluates trustees' sense of institutional awareness and engagement by assessing whether they feel adequately informed about strategic initiatives, challenges, and opportunities, and by identifying areas where trustees seek greater involvement in University initiatives that align with their expertise. Finally, the review assesses Board dynamics by inquiring about trustees' relationship with the president and with other Board members. The results inform the Trusteeship Committee's ongoing efforts to enhance Board effectiveness, refine committee structures, and improve trustee engagement strategies.

#### Supporting documentation, Standards 2.A.1:

Institutional board governance policies and procedures

- Willamette Board of Trustees Committee Structure and Roles
- Board Committee Restructure
- [Board of Trustees List](#)
- [Trustee Conflict of Interest Policy](#) (see also, Standard 2.D.3)

Bylaws and Articles of Incorporation referencing governance structure

- [Bylaws](#)
- [Articles of Incorporation](#)

Board's calendar for reviewing institutional and board policies and procedures or evidence that demonstrates regular review of board policies and procedures

- See description above

Optional: Board self-evaluation materials

- Trustee Self-Evaluation Form

## Standard 2.A.2.

*The institution has an effective system of leadership, staffed by qualified administrators, with appropriate levels of authority, responsibility, and accountability who are charged with planning, organizing, and managing the institution and assessing its achievements and effectiveness.*

Per the University [Bylaws](#), the Board delegates the authority to implement established policy to the President, who—within the limitations of the budget and University policy—may “create and fill any administrative or academic positions [they] deem necessary or convenient for the effective functioning of the University” (Section 4.1.1).

The University’s administration is broadly divided into five high-level [organizational units](#): Finance, Facilities, and Operations; Academic and Student Affairs; Human Resources and Integrated Technology Services; University Communications; and Advancement. The individuals leading these units report directly to the President:

[University Provost](#) (Academic and Student Affairs)

[VP of Communications and Chief of Staff](#) (University Communications)

[VP and General Counsel](#) (Human Resources and Integrated Technology Services)

[VP of Finance and Chief Financial Officer](#) (Finance, Facilities, and Operations)

[VP of Advancement](#) (Advancement)

Beyond the President’s direct reports, the following unit heads are responsible for the organization, planning, and management within their respective areas:

Academic and Student Affairs (reporting to the University Provost):

[VP of Student Affairs](#)

[VP of Enrollment Management](#)

[Dean of the Atkinson Graduate School of Management](#)

[Dean of the Faculty of Arts and Sciences](#)

[Dean of the School of Computing and Information Sciences](#)

[Dean of the School of Law](#)

[Dean of the Pacific Northwest College of Art](#)

Integrated Technology Services (reporting to the VP and General Counsel):

[Chief Information Officer](#)

### *Reporting and Review*

Per the University’s human resources practices, the President, Provost, and General Counsel review each member of the Leadership Team annually. The President reviews his direct reports; the Provost reviews the academic deans, VP of Enrollment, and VP of Student Affairs; and the General Counsel reviews the CIO. These leadership positions are typically selected through national search processes (with some exceptions for internal promotion). In addition to annual performance evaluations required of all University employees, the deans are formally reviewed by the Provost every five years, and the President is reviewed annually by the Board of Trustees’ Executive Committee.

Supporting documentation, Standards 2.A.2:

Leadership organizational chart

- [Willamette University Organizational Chart](#)

Curriculum vitae of executive leadership

- Provost, Jennifer Jacobs Henderson
- VP of Communications and Chief of Staff, Colleen Kawahara
- VP and General Counsel, Shana Sechrist
- VP of Finance and CFO, Anne Gallagher
- VP of Enrollment Management, William Mullen
- VP of Advancement, Shelby Radcliffe
- VP for Student Affairs, Lisa Landreman
- CIO, Jeremy Lovato
- AGSM Dean, Romana Autrey
- PNCA Dean, Jennifer Cole
- Law Dean, Jeffrey Dobbins
- SCIS Dean, Jameson Watts
- Interim Arts & Sciences Dean, Kelley Strawn

Standard 2.A.3.

*The institution employs an appropriately qualified chief executive officer with full-time responsibility to the institution. The chief executive may serve as an ex officio member of the governing board(s) but may not serve as its chair.*

Willamette's President, Stephen E. Thorsett, serves as the chief executive officer and is appointed by the Board of Trustees to implement its policies. As an *ex officio* member of the Board and in accordance with the University's mission, the President sets the strategic direction for the University, develops and implements Willamette's [Strategic Plan](#), and assesses progress toward stated goals. The President reports to the Board annually and makes recommendations regarding Willamette's growth, promotion, and development. As an *ex officio* chair of the faculty, the President also has administrative oversight of academic matters, oversees campus operations and functions, and prepares materials for the Board's appointment of Willamette's officers, deans, and faculty. The President's Office is the primary administrative liaison to the Board of Trustees and coordinates important perennial University-wide events (see [Bylaws, 4.1.1 - 4.1.2](#)).

[The University's 20th President](#), Thorsett is an internationally recognized astrophysicist who brings to Willamette more than two decades of experience as a scholar, teacher, and academic leader. Before coming to Willamette in 2011, he was a professor and chair of the Department of Astronomy and Astrophysics at the University of California, Santa Cruz (UCSC). He also served as the dean of UCSC's Division of Physical and Biological Sciences, leading a unit roughly comparable to Willamette in terms of budget and FTE.

Supporting documentation, Standards 2.A.3:

Curriculum vitae of President/CEO, President, Stephen Thorsett

#### Standard 2.A.4

*The institution's decision-making structures and processes, which are documented and publicly available, must include provisions for the consideration of the views of faculty, staff, administrators, and students on matters in which each has a direct and reasonable interest.*

With oversight by the President and members of the Leadership Team, the University's day-to-day administrative and academic functions are carried out by their respective academic and operational units. Unit-level governance and administration structures, as well as various communications from University leadership, disseminate information about University operations and provide opportunities for campus community input. Willamette's primary unit-level governance and committee structures are outlined below.

#### *Governing Bodies*

Faculty Governance. In accordance with University Bylaws and subject to the approval of the deans and the President, Willamette's various faculties have the responsibility to formulate and adopt faculty personnel, academic standards, policies, curricula, methods of instruction, and governance structures for their respective units ([Bylaws, 4.3 - 4.6](#)). Each faculty maintains its own handbook outlining its governance structures, committees, and processes. Typical unit-level faculty governance committees oversee faculty hiring, evaluation, and development; curriculum and learning assessment; academic policies; and budget. Additional faculty appointments are made for University-wide committees, and each faculty considers governance to be part of its tenure and promotion service requirements. Recommendations from faculty committees may be taken to the broader faculties for a vote, reviewed by the deans or Provost, or may ultimately be subject to approval by the President (e.g., faculty handbooks, staffing, etc.).

Academic Unit-level Governance. Within each of the University's six academic units (e.g., degree-granting colleges and schools), the deans have purview over scheduling and teaching assignments, unit-level budgets, and staffing and hiring (though continuing and permanent positions are vetted by the Provost and ultimately approved by University Leadership). Each faculty oversees its unit's curriculum and academic policies, except in the case of Willamette College—whose curricular body includes representatives from the Faculty of Arts and Sciences, School of Computing and Information Sciences, and Atkinson Graduate School of Management.

Committee of Studies. Willamette's Bylaws outline a provision for an *ad hoc* mechanism to develop new programs that transcend academic units (e.g., before Willamette established the School of Computing and Information Sciences, Atkinson and Arts and Sciences faculty contributed to a computer and data science committee of studies.) Willamette currently does not have an active committee of studies.

Provost's Academic Council. With stakeholders from each of the five faculties, the Registrar's Office, Finance, Enrollment, and University Accreditation, the Provost's Academic Council (PAC) seeks to ensure transparency, consistency, and collaboration

across Willamette’s academic units. PAC has taken multiple iterations since its launch in 2019, and Provost Henderson will explore other formats or structures for PAC’s work.

President’s Administrative Cabinet. Comprising the President, his direct reports, and the VP of Student Affairs and VP for Enrollment Management, this group meets weekly to oversee the administrative work of the University—including University operations, major projects, review of policies recommended by the Policy Committee, and confirming positions recommended by the Positions Committee (as outlined below).

Leadership Team. The Leadership Team includes members of the President’s Administrative Cabinet, as well as academic deans, VPs, and the CIO. This group meets monthly, during which it receives updates from the President, oversees the implementation of the University’s strategic priorities (including the Strategic Plan), and provides feedback on various initiatives and projects.

Other Administrative Committees. The University also enlists the following administrative committees to oversee specialized operational components of its work:

- *Digital and Web Governance Committee:* Develops and maintains guidelines for Willamette’s digital sites and initiatives, and ensures Willamette’s digital presence tells an authentic story aligned with the University’s mission, goals, and values.
- *Policy Committee:* Develops and reviews new or revised University policies through Willamette’s [Policy Development and Approval Process](#). All policies are submitted to the President and Administrative Cabinet for final approval.
- *Deans Council:* Comprising the deans for all five faculties, the Deans Council provides feedback to the Provost on academic matters, and serves as a mechanism to convey information from the Provost to academic leadership. Other campus partners (e.g., Marketing, Finance, Student Affairs, etc.) occasionally join Deans Council meetings to provide updates or gather feedback.
- *Facilities & Space Committee:* Evaluates capital project planning and space use requests to ensure the strategic use and planning around University facilities.
- *Technology Committees:* Willamette University maintains two key technology committees: the Academic Technology Advisory Committee (ATAC) and the Information Technology Advisory Committee (ITAC). These groups bring together faculty, staff, students, and administrators to guide academic technology priorities and institutional IT planning.
- *Positions Committee:* Reviews new or refilled positions for alignment with University priorities, and submits to the Administrative Cabinet for final approval.

Student Governance. There are also a number of student-led governing bodies that reflect Willamette’s various student populations. The [Associated Students of Willamette University \(ASWU\)](#) is a student government organization serving students attending Willamette College. [PNCA’s Student Councils](#), one for undergraduate students and one for graduate students, provide a forum for students to voice opinions and receive information about opportunities and issues concerning the PNCA student body. The

[Student Bar Association \(SBA\)](#) is the primary governing body for students in the School of Law. Similarly, the [Atkinson Student Association Board](#) monitors and facilitates student organizations in the Willamette MBA programs. A representative from each of these student organizations serves as a representative on Willamette's Board.

### *Communicating Governance Decisions*

The University's various governing bodies and committees report their work out through an array of channels. At the academic unit level, faculty governance committees provide updates to their colleagues and gather input for committee-level decisions at faculty meetings; many also circulate updates via faculty listservs and digests. Additionally, representatives from administrative offices such as Admissions, Student Affairs, Finance, and Human Resources provide updates to faculty at relevant points in the academic year. Deans, the Provost, and the President also provide newsletter updates.

For University staff, twice-yearly Employee Forums allow for updates from University leadership on key initiatives. Senior leadership may also provide updates to individual divisions or units, by request. To supplement these less frequent gatherings, a daily digest, "Today@Willamette," is sent to the entire University community, and includes information on upcoming events, administrative projects and processes, and policy changes (many of which are announced with a period of public comment). Other administrative leaders send email updates as needed, and the President's newsletter is also sent to University staff. These various in-person and written communications ensure that members of the University community are kept apprised of institutional decision-making and governance processes.

#### Supporting documentation. Standards 2.A.4:

Institutional governance policies and procedures

- [University Policy Development Process](#)
- [Policy on Adoption and Revision of Faculty Handbooks](#)
- Student Governance Organizations
  - [School of Law, Student Bar Association](#)
  - [Willamette MBA, Atkinson Student Association Board](#)
  - [PNCA, Student Council](#)
  - [Willamette College, Associated Students of Willamette University \(ASWU\)](#)
- Faculty Handbooks and Governance Procedures
  - [Arts & Sciences Faculty Handbook](#)
  - [PNCA Faculty Handbook](#)
  - [Law Faculty Handbook](#)
    - Law faculty governance memo
  - [AGSM Faculty Handbook](#)
  - [SCIS Faculty Handbook](#)
  - CAP (Willamette College) curricular structure slide deck

Documentation of decision-making structures and processes publicly available to relevant constituencies, if not already addressed in the provided policies

- Provost's Academic Council Charter (AY 2024-25)

- Presidential Emails to the campus community
  - June 2025 End-of-Year Reflection (topics: fiscal constraints, higher ed market, budget)
  - June 2024, FY25 Budget Update (topics: higher ed industry, enrollment, budget)
  - June 2023, EOY Message: (topics: SCIS launch, enrollment, facilities, campaign, budget)
  - May 2022, EOY Words from Waller (topics: PNCA merger, enrollment, strategic plan)

## Academic Freedom

### Standard 2.B.1

*Within the context of its mission and values, the institution adheres to the principles of academic freedom and independence that protect its constituencies from inappropriate internal and external influences, pressures, and harassment.*

### Standard 2.B.2

*Within the context of its mission and values, the institution defines and actively promotes an environment that supports independent thought in the pursuit and dissemination of knowledge. It affirms the freedom of faculty, staff, administrators, and students to share their scholarship and reasoned conclusions with others. While the institution and individuals within the institution may hold to a particular personal, social, or religious philosophy, its constituencies are intellectually free to test and examine all knowledge and theories, thought, reason, and perspectives of truth. Individuals within the institution allow others the freedom to do the same.*

Willamette University's support for preserving and ensuring academic freedom, freedom of expression, and institutional independence is evidenced in its policies, governance structure, and delegation of authority.

Article 4.6 of the [University Bylaws](#) vests academic freedom firmly in the faculties of each academic unit by granting them authority over academic policies, programs, curricula, instructional methods, faculty personnel policies, and tenure requirements—subject to the approval of the President. While these policies do not require Board approval, the Board retains the final decision on tenure (Article 4.5), recognizing tenure as essential to preserving academic freedom.

Definitions around academic freedom and its accompanying responsibilities are outlined in the faculty handbooks for each unit. This handbook language is informed by professional best practices, including the AAUP's 1940 *Statement of Principles on Academic Freedom and Tenure* as well as the American Bar Association's [Managing Director's September 2024 Guidance Memo](#) on ABA Standard 208 (Academic Freedom and Freedom of Expression).

Willamette's commitment to students' intellectual and artistic freedom, open discourse, and exchange of ideas is highlighted in the [Student Code of Conduct](#), which applies to all students at the University.

In recent years, University leadership has recognized that while Willamette’s policies and bylaws effectively safeguard academic freedom, evolving external pressures on higher education require more proactive measures. In response, Willamette established a [Campus Demonstration Policy](#) and an updated [Posting Policy](#) in 2025. Together with the existing [Political Policy](#), these measures protect the rights of campus community members to express their views while also minimizing the risk of discriminatory actions or activities that could jeopardize Willamette’s nonprofit status.

Supporting documentation, Standards 2.B.1 and 2.B.2:

Academic freedom policies and procedures

- [Willamette University Bylaws](#) (note Articles 4.5-4.6 regarding faculty tenure and academic policies)
- [Arts & Sciences Faculty Handbook](#), Policy of Academic Freedom and Responsibility
- [PNCA Faculty Handbook](#), Section 2.1
- [AGSM Faculty Handbook](#), Section 4.7
- [SCIS Faculty Handbook](#), Section 4.5
- [Law Faculty Handbook](#), Section XIV

Evidence of students’ academic freedom

- [Willamette Student Code of Conduct](#)
- [Arts & Sciences Faculty Handbook](#), Policy of Academic Freedom and Responsibility
- [PNCA Faculty Handbook](#), Section 2.1, item D
- [Law Student Honor Code](#)
- [Campus Demonstration Policy](#)
- [Posting Policy](#)
- [Political Policy](#)

## **Policies and Procedures**

### Standard 2.C.1

*The institution’s transfer-of-credit policy maintains the integrity of its programs and facilitates the efficient mobility of students desirous of the completion of their educational credits, credentials, or degrees in furtherance of their academic goals.*

Willamette University maintains comprehensive transfer-of-credit policies across its various academic programs and units. These policies are designed to ensure the integrity of Willamette’s degree offerings while also facilitating student mobility and degree completion. The University’s admissions website features a dedicated [resource page for transfer students](#), which includes information about transferring into any of the University’s undergraduate or graduate programs. Enrollment team members also work closely with relevant deans and registrars to remain up-to-date on curricular changes, policies, and other information that may affect transfer credit. Specific transfer policies and practices in Willamette’s various academic units are outlined below.

#### *Undergraduate Transfer*

Willamette’s [Undergraduate Transfer Credit Policies](#) establish clear parameters that maintain academic standards while maximizing credit mobility. Following the

consolidation of undergraduate admissions as part of Willamette’s merger with PNCA in 2021, the University has worked to create greater consistency in transfer admissions policies between its two undergraduate colleges (Willamette College and PNCA). Despite these efforts, some small variations remain, and are detailed on the [Registrar’s Office Transfer Credit website](#), in PNCA’s [Transfer Equivalency Guide](#), and on PNCA’s [transfer admissions requirements](#) page.

In most cases, courses taken at regionally accredited colleges or universities will receive full credit if they are comparable to courses offered at Willamette, or are otherwise consistent with the goals and standards of Willamette's undergraduate degree programs. To be eligible for transfer credit, courses must be described in the catalog of the college from which they are being transferred and recorded on the student’s college transcript. Courses with grades below C minus (“C-”) will not receive credit, and transfer courses are not used in computing the Willamette University grade point average.

Willamette’s undergraduate programs also actively promote student mobility through structured pathway programs. PNCA has [Transfer Agreements](#) with 18 colleges and offers dedicated scholarships and clear course equivalencies, allowing it to enroll 40-60 BFA transfer students annually. Launched in Academic Year 2024-25, Willamette College’s [Bearcat Pathways program](#) includes defined pathways in 11 programs from Chemeketa and Clackamas Community Colleges. The program has seen early success with 19 students utilizing this transfer pathway for Fall 2025.

In addition to consultations provided by Willamette’s admissions team, undergraduate transfer students also have access to additional advising and resources once they enroll at Willamette. Willamette College’s [Transfer Student Advising page](#) provides a checklist, transfer credit and course load explanations, information on planning one’s first semester at Willamette, and contact information for additional resources. Professional advising staff at both PNCA and Willamette College provide support for students seeking to understand their degree audit or petition for specific credit transfers.

Willamette is committed to continuous improvement in all aspects of its work—including transfer student outcomes. Until recently, Willamette College did not enroll a large number of transfer students, and as such, the University relied upon IPEDS metrics for transfer rather than building internal definitions that helped the University to better understand its students. As Willamette seeks to enroll more undergraduate transfer students, the Institutional Research office is working closely with Enrollment to develop more useful definitions and classifications regarding transfer students to inform data gathering and analysis (e.g., pre-college transfer, postsecondary transfer, Transfer Pathways students, etc.). Once established, the University will use this data to improve transfer pathways and educate faculty and staff about credit-transfer barriers students may face as they seek to complete undergraduate degrees at Willamette.

### *Graduate Program Transfer*

Each of Willamette’s graduate programs maintains and publishes transfer policies appropriate to their disciplinary requirements. The [Law School](#) outlines its transfer credit policies on its website, as does the [Hallie Ford School of Graduate Studies](#). The Atkinson Graduate School of Management has separate transfer policies for its Early Career/Career Change MBA program and its MBA for Professionals program—all of which are outlined in the [MBA Student Handbook](#). Per the [School of Computing and Information Sciences \(SCIS\) student handbook](#), no courses taken at another university will count toward SCIS graduate programs.

#### Supporting documentation, Standard 2.C.1:

Transfer of credit policies and procedures

- [Undergraduate Transfer Policies](#) (WC and PNCA)
  - [PNCA Undergraduate Transfer Equivalency Guide](#)
  - [PNCA Transfer Admissions website](#)
  - [PNCA Transfer Pathways program](#)
  - [Willamette College Bearcat Pathways program](#)
- Graduate Transfer Policies
  - [Willamette JD Transfer Policies](#)
  - [Willamette MBA Transfer Policies \(Handbook, Section VII\)](#)
  - [SCIS Student Handbook](#)
  - [PNCA Hallie Ford School of Graduate Studies Transfer Admissions page](#)
- Transfer Advising and Support
  - [Willamette College Transfer Student Advising Resources page](#)
  - [PNCA Academic Advising page, with transfer-specific information](#)

#### Standard 2.C.2

*The institution’s policies and procedures related to student rights and responsibilities should include, but not be limited to, provisions related to academic honesty, conduct, appeals, grievances, and accommodations for persons with disabilities.*

In 2023, a committee comprising representatives from each academic unit developed and approved a University-wide [Academic Integrity Policy](#). This was the first academic policy shared at the University level, and was developed to provide common definitions and guidance for students around Academic Integrity across all courses and programs. The adjudication of violations of this policy is still conducted at the unit or program level per the respective student populations and/or disciplinary conventions, and these review processes, appeals processes, and sanctions are outlined in each unit or relevant program’s student handbook—all of which are now contained in the [University Catalog](#). Given the increased movement of students between Willamette’s academic units and programs, professors are expected to outline any discipline-specific interpretations of plagiarism, use of sources, etc., for students who may be taking courses outside of their “home” college or program. Complaints regarding grading or other academic evaluations are outlined in each unit or program’s student handbook in the [Catalog](#).

All Willamette University students are also held to a common [Student Code of Conduct](#). Reported behavioral concerns are investigated and adjudicated by Student Affairs staff and follow the procedures outlined in the Code of Conduct, FERPA guidelines, and ethical standards for student privacy. In addition, all students at the School of Law are subject to additional academic, behavioral, and professional standards outlined in the [Law Student Handbook](#). These standards are designed to align with the expectations of the legal profession and ensure students meet character and fitness requirements set forth by the American Bar Association and state bar licensing authorities.

Additional complaint and grievance procedures are outlined on Willamette's [Compliance website](#). This includes information such as how to report complaints regarding University faculty or staff, sexual misconduct, bias, discrimination, ADA accommodation, educational quality, consumer protection, and other civil complaints to internal and external entities.

Willamette's Office of [Accessible Education Services \(AES\)](#) tracks and facilitates student accommodations and serves as a resource to all members of the University community on accessibility issues for students. The AES website provides information about the process of requesting accommodations, required documentation, and [program-specific variations in the accommodations process](#). The office also provides information about on- and off-campus resources and accessible technology tools to support students with disabilities. Students may request a review of an ADA accommodation decision using the [Procedure for Review of an AES Decision](#). Students may also request review of situations in which they believe accommodation decisions are not adequately implemented and/or enforced using the [Procedure for Review of an Accommodation Implementation](#).

#### Supporting documentation, Standard 2.C.2:

Documentation of student's rights and responsibilities policies and procedures, which include:

- Academic honesty
  - [University Academic Integrity Policy](#)
  - Academic Integrity Adjudication processes for each program/unit
    - [Willamette College](#)
    - [Pacific Northwest College of Art](#)
    - [Atkinson Graduate School of Management](#)
    - [School of Law](#)
    - [Hallie Ford School of Graduate Studies](#)
    - [School of Computing and Information Sciences](#)
- Conduct
  - [University Student Code of Conduct](#)
  - Law Student Handbook, which outlines
    - [Standards of Conduct](#)
    - [Honor Code](#)
  - [University Housing Handbook](#)
  - [Student Employment Handbook](#)
- Appeal and grievance processes
  - University-wide, per Willamette's [Compliance website](#)

- [Sexual Misconduct Reporting Form](#)
    - [Bias Report Form](#)
    - [Contacts for reporting incidents of discrimination or Title IX violations](#)
    - [Procedure to review an Accessible Education Services decision](#)
    - [Procedure for review of an Accommodation Implementation](#)
    - WU-provided link to [Oregon DOJ Consumer Complaints](#) for consumer protection or other civil complaints (linked from [Compliance website](#))
  - Per program or unit (student handbooks)
    - [Willamette College](#)
    - [Pacific Northwest College of Art](#)
    - [Atkinson Graduate School of Management](#)
    - [Hallie Ford School of Graduate Studies](#)
    - [School of Computing and Information Sciences](#)
    - [School of Law](#)
- Accommodations for persons with disabilities
  - [Accessible Education Services website](#), with links to AES processes, applications, and accommodation requests
  - [AES Accommodation Guidelines](#)
  - [AES Accommodation Resources](#)
  - [Procedure to review an Accessible Education Services decision](#)
  - [Procedure for review of an Accommodation Implementation](#)

### Standard 2.C.3

*The institution’s academic and administrative policies and procedures should include admission and placement policies that guide the enrollment of students in courses and programs through an evaluation of prerequisite knowledge, skills, and abilities to ensure a reasonable probability of student success at a level commensurate with the institution’s expectations. Such policies should also include a policy regarding continuation in and termination from its educational programs, including its appeal and re-admission policy.*

Each of Willamette’s colleges and schools maintains distinct admissions, placement, academic standing, and readmissions policies tailored to the needs of their student populations and disciplinary norms (e.g., undergraduate, graduate, and professional programs such as law and business). While policies vary, the University has recently taken steps to increase clarity and consistency across units. In Fall 2024, Willamette redesigned its [Admissions website](#) to be more accessible and student-friendly, and in AY 2025–26 it consolidated unit-level handbooks into a unified [University Catalog](#), streamlining access for current and prospective students.

#### *Admissions Policies*

Policies and requirements for admission vary by academic program and population. Factors affecting these varied policies include student demographics (undergraduate, graduate, transfer, professional/adult learner), program content (e.g., art programs require portfolios), and program-specific admissions and recruitment timelines. There are also cases in which admissions requirements and processes vary within a degree program—for example, the standard MBA program and accelerated 1-Year MBA programs have

different admissions processes and requirements, as do the regular and direct admission JD programs. These various processes and requirements are detailed on [Willamette's Admissions website](#), and members of the admissions team are available for consultation.

While not shared externally, Willamette's admissions teams have documented processes to review applicants (e.g., Willamette College and PNCA). This includes the University's adherence to the National Association for College Admission Counseling's "Principles of Good Practice" and American Bar Association Standards 501-503.

#### *Placement Policies and Practices*

At the undergraduate level, students may place out of courses based upon examinations in language, music, and mathematics (Willamette College) or in digital tools (PNCA), and may petition to have a course requirement waived. Credit and placement may also be granted for Advanced Placement (AP) or International Baccalaureate (IB) coursework. These policies are detailed on the [Willamette College website](#) and on the [undergraduate admissions transfer credit page](#). Graduate programs have more limited waiver or placement policies, with details outlined in their respective student handbooks.

#### *Academic Standing Policies*

Academic standing definitions and interventions are published in the [University Catalog](#), and are based on credit progress and GPA thresholds appropriate to each degree level. In Spring 2025, representatives from Willamette's various degree programs approved revised academic status definitions, resulting in greater alignment around definitions and their respective interventions—appropriate for degree level. One exception to this is the JD programs, which have retained common ABA language around academic status.

#### *Readmissions Policies and Procedures*

Each academic program has specific policies that govern their readmission practices. These practices may vary within a unit's degree programs (e.g., readmission to JD vs LLM programs), as well as by the reason for readmission (e.g., following a leave of absence or an academic dismissal). These policies and practices are detailed in each unit's handbook in the [University Catalog](#).

#### Supporting documentation, Standard 2.C.3:

Policies and procedures for admitting and placing students

- Admissions Procedures
  - Internal Willamette Admissions Undergraduate and HFSGS Application Reader
  - Internal PNCA Admissions Application Reader Manual
  - Internal Willamette College Holistic Review process and criteria document
- Willamette College
  - [Undergraduate BA & BS Admission webpage](#)
  - [Transfer Student Admission webpage](#)
  - [International Student Admission webpage](#)
  - [Willamette College Placement procedures](#) (languages, music, and mathematics)

- [Policies and Procedures for Deferring Admission](#)
- [Willamette College Admissions \(University Catalog\)](#)
- Pacific Northwest College of Art
  - [Undergraduate BFA Admission webpage](#)
  - [International Student Admission webpage](#)
  - [Transfer Student Admission webpage](#)
  - [Veteran Student Admission webpage](#)
  - [Challenging Placement in a Course, Digital Tools Challenge Exam](#) (Catalog link)
  - [Policies and Procedures for Deferring Admission](#) (Catalog link)
  - [PNCA Admissions Overview](#) (Catalog link)
- School of Law
  - [JD, MLS, and LLM Admission](#)
  - [Direct Admissions Program Requirements webpage](#)
- [Hallie Ford School of Graduate Studies](#)
- Atkinson Graduate School of Management
  - [Full-time MBA Admission webpage](#)
  - [One-Year MBA Admission webpage](#)
  - [MBA for Professionals Admission webpage](#)
  - [MBA International Student Admission webpage](#)
  - [MBA Course “Waivers” are outlined in the AGSM Handbook](#) (Catalog link)
- School of Computing and Information Sciences (graduate programs)
  - [MS in Data Science Admission webpage](#)
  - [MS in Computer Science Admission webpage](#)
  - Course Waivers policies are outlined in [SCIS Graduate Handbook](#) (Catalog link)

Policies and procedures related to continuation and termination from educational programs including appeal process and readmission

- [Atkinson Graduate School of Management](#) (Catalog link)
- [Pacific Northwest College of Art](#) (Catalog link)
- [Hallie Ford School of Graduate Studies](#) (Catalog link)
- [Computing and Information Sciences \(graduate programs\)](#) (Catalog link)
- Willamette College
  - [Academic Standing & Appeals](#) (Catalog link)
  - [Readmission](#) (Catalog link)
- [School of Law](#) (Catalog link)

#### Standard 2.C.4

*The institution’s policies and procedures regarding the secure retention of student records must include provisions related to confidentiality, release, and the reliable backup and retrievability of such records.*

Willamette maintains robust policies and practices to ensure the effective administration, security, and compliance of institutional records and data. The University’s [Records Management Policy](#) governs the lifecycle of all records—including student education records—covering maintenance, archiving, and disposal. These practices ensure compliance with state, federal, and accreditation requirements; preserve institutional history; mitigate risks associated with confidential information; and promote efficient use of physical and digital storage.

In tandem with this broader policy, the Registrar’s Office upholds an [Education Records Policy](#) that is aligned with the Family Educational Rights and Privacy Act (FERPA). This policy details procedures for accessing and releasing education records, designating directory information, and reviewing records, as well as specifying the custodianship of student records by unit. All employees with access to student records complete annual FERPA training, and the University employs access controls, secure storage, and regular system backups to safeguard data integrity and privacy.

Beyond student records, Human Resources manages staff and faculty employment files using Workday, which incorporates secure authentication protocols and automated backups. Records are separated in accordance with statute and legal guidance: Human Resources maintains staff performance records, while faculty performance records are overseen by academic deans.

The University’s Information Technology team provides institution-wide oversight of data security through policies including the [Information Security Policy](#), [Enterprise Application Administration Policy](#), and [Cybersecurity Incident Response Policy](#). These policies apply to all faculty, staff, student employees, volunteers, and affiliates, and collectively ensure the confidentiality, integrity, and availability of institutional data. Strategic staffing within IT supports expert management of University systems, with regular monitoring and safeguards for all applications housing confidential information. Willamette’s cybersecurity policies and practices are further discussed under Standard 2.I.1.

In 2024, Willamette established a Data Governance Committee to oversee the accuracy, accessibility, security, and adequacy of institutional data across all schools and divisions. The committee includes representatives from Institutional Research, the Registrar’s Office, Enrollment, and Information Technology, and is charged with “maximizing institutional data accuracy and integrity, data accessibility, data security, and data adequacy across all schools and divisions at Willamette University.”

Supporting documentation, Standard 2.C.4:

Policies and procedures regarding secure retention of student records

- Policies
  - [Records Management Policy](#)
  - [Education Records Policy](#)
  - [Information Security Policy](#)
  - [Cybersecurity Incident Response Policy](#)
  - [Enterprise Application Administration Policy](#)
- Procedures
  - Certificate of Records Transfer form
  - Registrar Records Retention Schedule
  - Records Destruction Authorization and Certificate form
  - Data Governance Committee Charge

## Institutional Integrity

### Standard 2.D.1

*The institution represents itself clearly, accurately, and consistently through its announcements, statements, and publications. It communicates its academic intentions, programs, and services to students and to the public and demonstrates that its academic programs can be completed in a timely fashion. It regularly reviews its publications to ensure accuracy and integrity in all representations about its mission, programs, and services.*

Willamette has established clear policies and processes to ensure accurate, consistent communications about its academic programs and offerings. These processes apply both to recruitment by admissions staff and to information published on the University's website and other materials.

#### *Accuracy in Written Communications*

The [University website](#) serves as the primary source of information about programs, degree requirements, courses, faculty, learning outcomes, admissions and financial aid, and alumni outcomes. Each program page includes a "[Program Snapshot](#)" summarizing degree type, credit hours, estimated completion time, and campus location.

Willamette's [Marketing and Communications office](#) affirms its commitment to integrity and provides mechanisms for reporting concerns about accuracy or clarity. In Fall 2024, the University launched a new website accompanied by a [Website Content Policy](#) that outlines web content governance, accuracy, lifespan, security, tracking, accessibility, and media use. This policy applies to both centrally managed and campus community-generated content on the willamette.edu domain.

Designated Web Content Administrators manage the creation, review, approval, and publishing of website content. All projects follow a Marketing Project Workflow, with larger initiatives using a comprehensive Creative Brief process that addresses audience, intent, messaging, goals, and timelines. These processes are meant to ensure accuracy and consistency, as well as to build a shared understanding around developing external content. All marketing materials are shared with departmental points of contact for review and approval prior to publication.

#### *Accuracy in Recruitment*

Admissions staff serve as the University's primary representatives to prospective students and families. As such, Admissions team members receive extensive training in program knowledge and recruitment practices, and meet weekly with leadership for continued development. Admissions staff adhere to the [National Association for College Admission Counseling's \(NACAC\) Guide to Ethical Practice in College Admission](#).

To support accuracy in recruitment, deans and faculty regularly meet with the Admissions team to provide updates on programs and courses. Recruiters use vetted, standardized

slide decks, which are not to be altered. Admissions leadership observes recruitment presentations to monitor accuracy and provide corrective feedback when necessary.

#### Supporting documentation, Standard 2.D.1:

Description of procedures or process for reviewing published materials for academic programs

- [Marketing and Communications Accuracy Statement](#)
- [Website Content Policy](#)

Links to program information that demonstrate clear information about time to completion for programs

- Sample program websites (see “Program Snapshot,” left side of program page)
  - [BS or BA in Chemistry](#) (Willamette College)
  - [BFA in General Fine Arts](#) (PNCA)
  - [Doctor of Jurisprudence](#) (School of Law)
  - [MFA in Creative Writing, Low-Residency](#) (PNCA - Hallie Ford School of Graduate Studies)
  - [MBA for Professionals](#) (AGSM)
  - [MS in Data Science](#) (SCIS)

Description of procedures or process for reviewing published materials about services available to students

- Marketing Project Workflow
- Creative Brief Template

Description or evidence of recruiting practices that ensures accurate information is provided to prospective students

- WU Admissions Travel Training doc
- NACAC [Guide to Ethical Practice in College Admission](#)
- Information Session template slide decks
  - Inquiry Session
  - Admitted Students Session

#### Standard 2.D.2

*The institution advocates, subscribes to, and exemplifies high ethical standards in its management and operations, including in its dealings with the public, NWCCU, and external organizations, including the fair and equitable treatment of students, faculty, administrators, staff, and other stakeholders and constituencies. The institution ensures that complaints and grievances are addressed in a fair, equitable, and timely manner.*

Willamette is guided by a [Statement of Nondiscrimination](#), which “prohibits discrimination against any individual in the University community, on the basis of race, color, religion, sex, sexual orientation, gender identity, pregnancy, national or ethnic origin, disability, age, genetic information, military or veteran status, or any other characteristic protected by applicable local, state, or federal law.” Consistent with this statement, the University maintains policies and procedures to ensure fair and ethical treatment of all community members and external partners.

#### *Academic Ethics and Grievances*

In 2023, representatives from all five faculties adopted a University [Academic Integrity Policy](#) to provide consistency in expectations for ethical academic conduct, especially as

more students enroll across multiple units. Faculty and programs may add discipline-specific guidance, but the University policy serves as a baseline standard. Each academic unit outlines investigation, adjudication, and appeal processes in its [student handbook](#).

Additionally, each academic unit [publishes](#) its processes for students to appeal or contest a grade. One exception to this is the law school, whose [handbook](#) indicates that grades submitted to the Registrar may not be changed—except in cases of computational or clerical error. Law students may also report concerns or irregularities in examinations. Records related to these complaints are retained in accordance with the University’s Record Retention Schedule and [Education Records Policy](#).

Willamette ensures students receive appropriate accommodations under the Americans with Disabilities Amendments Act of 2008 through its Accessible Education Services (AES) offices in [Salem](#) and [Portland](#). Processes for appealing AES decisions are detailed on the [AES website](#) and the [University’s Federal Compliance webpage](#).

If students cannot resolve issues within their college or school, [Willamette’s Federal Compliance webpage](#) directs them to external reporting resources, including NWCCU, and outlines complaint processes for bias, discrimination, sexual misconduct, accessibility, educational quality, and consumer protection. Law students may also file complaints about compliance with ABA standards, as detailed in the [law handbook](#).

#### *Community Ethics and Complaints*

The University also has a number of practices in place for ensuring strong institutional ethics outside of the academic experience. Willamette’s [Title IX Policies and Procedures](#) ensure compliance with federal regulations, while the [Student Code of Conduct](#) addresses non-Title IX sexual or gender-based misconduct. For grant-funded research, the University follows the [NSF Sexual Harassment Reporting Policy](#).

The Division of Student Affairs manages case records through Maxient, including [Community Concern](#), [Student CARE](#), [Bias Incident](#), and [Sexual Misconduct](#) reports. Records are maintained for seven years unless otherwise required by law or policy.

For employees, including student employees, Willamette enforces a [Workplace Prohibited Discrimination and Harassment Policy](#) and a [Workplace Accommodation Policy](#). Employees are further protected by [Whistleblower](#); [Fraud, Waste and Abuse Reporting](#); and [Investigation and Non-Retaliation](#) policies. The University also contracts with EthicsPoint to provide confidential, third-party reporting mechanisms.

Willamette policies extend to non-University participants as well. The [Protection of Minors on Campus and Mandatory Reporting Policy](#) safeguards minors involved in University programs, while the [Recruitment Nondiscrimination Policy](#) governs external employers conducting interviews on campus. Legal complaints and notices are maintained in the Office of the General Counsel for ten years.

Supporting documentation, Standard 2.D.2:

Policies and procedures for reviewing internal complaints, including

- Student academic-related grievances
  - Academic Integrity Violations and Adjudication, by unit
    - [AGSM Student Handbook, Investigating and Resolving Violations of Academic Integrity or Professional Behavior](#)
    - [Willamette College, Procedures for Violations of Academic Integrity](#)
    - [School of Computing and Information Sciences, Academic Dishonesty](#)
    - [School of Law Handbook, Honor Code](#)
    - [Pacific Northwest College of Art, Section F](#)
    - [Hallie Ford School of Graduate Studies, Section F](#)
  - Grade appeal processes, by unit
    - [AGSM Student Handbook, Section VII: Academic Regulations](#)
    - [Willamette College, Grade Appeals](#)
    - [Hallie Ford School of Graduate Studies, Contesting a Grade](#)
    - [School of Computing & Information Science, Final Grade Appeal Process](#)
    - [School of Law Handbook, Grades May Not be Changed](#)
    - [Pacific Northwest College of Art, Contesting a Grade](#)
  - [Requesting a Review of an AES Decision or Accommodation Implementation](#)
  - [Student Code of Conduct](#)
- Discrimination
  - [Workplace Prohibited Discrimination and Harassment Policy](#)
  - [Willamette University Statement of Non Discrimination](#)
  - [Recruitment Nondiscrimination Policy](#)
  - [Workplace Accommodation Policy](#)
- Title IX
  - [Willamette University Title IX Policy and Procedures](#)
- Evidence that complaint information is provided to students and prospective students with contact information for filing complaints with its accreditor and with state approval or licensing entity that would appropriately handle a student's complaint
  - [Willamette University Federal Compliance website](#), which includes a section on "Complaint and grievance processes"
  - [School of Law Handbook, Student complaints implicating compliance with ABA Standards](#)
- Description of process for maintaining a record of qualifying student complaints for seven years or longer and the processing of such complaints
  - [University Records Management Policy](#)
  - University Registrar Records Retention Schedule
  - [University Education Records Policy](#)

Policies and procedures for reviewing external complaints and grievances

- [Willamette University Federal Compliance website](#), which includes a section on "Complaint and grievance processes"
- [Protection of Minors on Campus and Mandatory Reporting Policy](#)
- [Willamette University NSF Sexual Harassment Reporting Policy and Guidelines for Reporting](#)
- [Investigation and Non-Retaliation Policy](#)
- [Fraud, Waste, and Abuse Reporting Policy](#)
- [Whistleblower Policy](#)

### Standard 2.D.3

*The institution adheres to clearly defined policies that prohibit conflicts of interest on the part of members of the governing board(s), administration, faculty, and staff.*

All Willamette University employees are bound by Willamette’s [Conflicts of Interest/Commitment Policy](#), which provides guidance for employees in situations where personal interests, activities, or commitments may prevent them from acting in the best interest of the University. It also provides guidance on the personal use of institutional resources. Additional guidance for faculty conflicts of interest is outlined in the individual faculty handbooks; specific mentions include the following:

- [Arts and Sciences Faculty Handbook](#) guidance regarding conflicts of interest in the Faculty Evaluations Committee (Section 4.1.6.1)
- [Atkinson Graduate School of Management Faculty Handbook](#) guidance regarding
  - managing outside conflicts (Section 2.1.1)
  - disclosing conflicts of interest as part of Faculty Dispute Resolution for members of Personnel Committees or Hearing Panels (Section 4.8)
- [School of Computing and Information Sciences Faculty Handbook](#) guidance regarding Tenure-track faculty’s management of outside conflicts (Section 2.1.1)
- [Pacific Northwest College of Art Faculty Handbook](#) guidance regarding potential conflicts of interest within departments during hiring (Section 2.8)

Trustees of Willamette University are bound to a [Conflict of Interest Policy](#), which is overseen and administered by the Trustees’ Audit, Risk, and Compliance Committee with support from the Administrative Secretary to the Board and the Vice President and General Counsel. This policy defines potential conflicts of interest, sets forth the duty to disclose potential or perceived conflicts of interest, and outlines procedures for reviewing, approving, managing, and monitoring conflicts appropriately. As part of upholding this policy, the Administrative Secretary of the Board sends a copy of the Conflict of Interest Policy and the Policy on Disclosable Transactions to each Trustee to review and complete annually, and confirms there are no previously unreported Conflicts of Interest to the Audit Committee Chair and the Vice President and General Counsel.

#### Supporting documentation, Standard 2.D.3:

Policies and procedures prohibiting conflict of interests among employees and board members

- [Willamette University Trustee Conflict of Interest Policy](#)
- Willamette University Policy on Discloseable Transactions
- [Willamette University Employee Conflict of Interest/Commitment Policy](#)
- Faculty handbook guidance regarding conflicts of interest in hiring and evaluations
  - [Arts & Sciences Faculty Handbook](#): Faculty Evaluations (Section 4.1.6.1)
  - [AGSM Faculty Handbook](#): managing outside conflicts (Section 2.1.1), conflicts as part of Personnel Committees or Hearing Panels (Section 4.8)
  - [SCIS Faculty Handbook](#): managing outside conflicts (Section 2.1.1)
  - [PNCA Faculty Handbook](#): conflicts during hiring (Section 2.8)

## Financial Resources

### Standard 2.E.1

*The institution utilizes relevant audit processes and regular reporting to demonstrate financial stability, including sufficient cash flow and reserves to achieve and fulfill its mission*

Willamette's financial statements, government fund usage, and retirement plan are audited annually (these audits are currently conducted by Moss Adams). The results of these audits are available within approximately 120 days of the end of the fiscal year and are reviewed by the president and the Board's Audit, Risk, and Compliance Committee; any findings that may arise from a federal uniform guidance audit would be addressed promptly. Willamette's audited financial statements for the past five years are made publicly available on the University's [website](#), and the University's most recent financial audit ([Fiscal Year 2023-24](#)) revealed no findings.

The Board's Audit, Risk, and Compliance Committee provides primary oversight of the University's financial reporting process; systems of internal control; audit process and auditors; monitoring compliance with laws, regulations, and codes of conduct; and risk management. As part of their responsibilities, the Committee appoints and oversees the University's auditors, supports the resolution of any disagreements between the auditor and management regarding financial reporting, reviews significant accounting and reporting issues, reviews and accepts the annual financial statements as audited, reviews the management's handling of major financial and enterprise risk exposures, and informs the Board in a timely manner of any significant irregularities or issues.

The University continues to keep pace with its goal to realize a positive operating budget in FY26. As of May 31, 2025, Willamette's operating results (budget basis) for FY25 were in line with the targeted deficit, with a slight positive variance on the adopted budget. On June 11, 2025, the Board approved the FY26 budget, which projects a balanced budget for the first time since Willamette's 2019 EIE Report and Site Visit. This balanced budget also includes a 2% cost of living increase for University employees.

#### Supporting documentation, Standard 2.E.1:

Policies and procedures that articulate the oversight and management of financial resources

- [Willamette's Trustee Bylaws](#) outline the roles of the Audit, Risk, and Compliance Committee in fulfilling the Board's oversight of the University's fiscal stability, see section 3.2

Latest external financial audit including management letter

- [Audited Financial Report for Fiscal Year Ending June 30, 2024](#)
- Draft Fiscal Year 2025 documents, as of August 21, 2025
  - Income Statement
  - Balance Sheet

## Standard 2.E.2

*Financial planning includes meaningful opportunities for participation by stakeholders and ensures appropriate available funds, realistic development of financial resources, and comprehensive risk management to ensure short term financial health and long-term financial stability and sustainability.*

Willamette employs an integrated and collaborative approach to financial management, combining responsible endowment oversight, multi-year forecasting, and disciplined budgeting with broad engagement from institutional stakeholders. University leadership works closely with academic and administrative units to develop realistic assumptions, establish clear financial guardrails, and prioritize strategic investments. These processes support the University's mission, maintain reserves, address emerging challenges, and promote long-term financial sustainability.

### *Endowment Management and Spending*

Willamette's endowment is managed by an external, third-party office, ensuring that full-time, experienced professionals implement the University's investment objectives. The Endowment Investment Policy guides investments with the dual goals of preserving perpetuity and providing general equity, and includes provisions for return expectations, risk tolerance, and liquidity. Following the Uniform Prudent Management of Institutional Funds Act (UPMIFA), Willamette's Endowment Spending Policy aims to provide a consistent or increasing level of support for University activities on an inflation-adjusted basis while maintaining intergenerational equity. Annual spending from both restricted and unrestricted endowment funds is capped at 5% of the trailing 16-quarter rolling average market value, and spending on underwater donor-restricted funds with a market value below 80% of historic dollar value is paused. Any exceptions to this policy require Board approval, and the Finance & Infrastructure Committee reviews the policy annually. The Vice President of Finance & Chief Financial Officer reports the spending rate to the Endowment Committee each year.

### *Budgeting Modeling and Guardrails*

Following a 2019 NWCCU recommendation to "develop a responsible enrollment forecasting methodology," University leadership implemented three major changes to budget modeling to reflect enrollment trends and fiscal realities.

First, in 2021, Willamette revised its five-year budgeting forecast to incorporate enrollment assumptions, undergraduate transfer and graduate student growth goals, targeted reductions in undergraduate discount rates, efficiency gains from the greater integration, and [Strategic Plan](#) cost assumptions. The forecast's assumptions were tested with the Vice President for Enrollment Management and each unit's deans for realism and achievability. Now in its fifth year, the forecast is monitored and revised regularly by the Finance team in consultation with unit heads and University leadership, and is reported to the Board's Finance & Infrastructure Committee.

Second, in response to enrollment declines during the COVID-19 pandemic, the Board developed a Budget Framework to guide financial and operational planning through 2026. This framework allows limited deficit spending while maintaining sufficient reserves. In conjunction with the framework, Willamette refinanced its debt in 2021, lowering interest rates and enabling interest-only payments. This allowed for deferred maintenance projects and strategic investments, including new degree programs in computing and data science.

Finally, the Finance team has redesigned budgeting processes to move away from siloed, unit-level budgeting toward a more strategic, University-wide approach aligned with institutional priorities. The details of this budgeting process are outlined below.

### *Collaborative Budgeting Process*

Building on the five-year forecast, the Finance team developed an integrated budget allocation and planning process in Fall 2024. This Budget Model promotes alignment with the University’s mission and strategic objectives, encourages shared responsibility and cross-division collaboration, and provides flexibility for unforeseen challenges and strategic investments.

Beginning in July each year, the budget process includes developing net tuition revenue assumptions, contribution and non-tuition revenue forecasts, unit-level budgeting, and ongoing refinements—culminating in May with Board approval (see Budget Development Calendar). Throughout the year, Finance meets with deans and vice presidents to review revenues, expenditures, and potential budget adjustments; unit leaders use this information to allocate and prioritize funds.

As part of this model, a Request for Funding (RFF) process was launched in Fall 2024 to manage additional resource requests more strategically. The RFF allows for holistic allocation of one-time expenses, ongoing budget increases, position requests, capital renewal, new program funding, and contributions to the quasi-endowment. Submissions are limited to division heads, fiscal officers, and the Finance team to ensure appropriate routing. The RFF process launched in FY25 with three review cycles.

#### Supporting documentation, Standard 2.E.2:

Policies and procedures for planning and monitoring of operating and capital budgets, reserves, investments, fundraising, cash management, debt management, transfers and borrowing between funds

- Five-Year Budget Forecast
- Board of Trustees Budget Framework
- University Endowment Spending Policy
- University Endowment Investment Policy

Sample of meeting agendas, minutes, and/or other documentation as evidence of meaningful opportunities for participation by stakeholders

- Budget Model Narrative

- FY26 Budget Development Calendar
- Request for Funding (RFF) Process Overview

### Standard 2.E.3

*Financial resources are managed transparently in accordance with policies approved by the institution's governing board(s), governance structure(s), and applicable state and federal laws.*

The University's financial resources are managed by the [Accounting Office](#), which oversees all accounting activities, prepares annual financial statements, and submits required compliance filings, including 1099s and IRS Form 990. Willamette's accounting system follows generally accepted accounting principles for nonprofit organizations and is integrated into its administrative platform, Ellucian Colleague. Processes such as tuition and vendor payments, purchasing card administration, employee reimbursements, gift acceptance, endowment management, and federal aid and grant fund oversight are conducted in compliance with internal and external regulations. Willamette's financial management is demonstrated by annual financial audits published on the [University website](#).

To support compliance, the Accounting Office maintains [policies](#) guiding day-to-day financial operations and responsible use of institutional funds. These policies are publicly available, and campus partners with purchasing authority—such as those with signature authority, purchasing cards, or student leaders—receive education on relevant policies upon gaining access. Each unit designates a Fiscal Officer with higher spending approval limits (up to \$50,000) to assist colleagues with accounting and budgeting questions. The Accounting Office also provides guidance on interpreting general ledger accounts, processing payment requests and journal entries, navigating Colleague, and conducting year-end accounting procedures. In 2020, the University adopted DocuSign to digitize and streamline these processes.

#### Supporting documentation, Standard 2.E.3:

##### Description of internal financial controls

- Policies to ensure internal financial controls
  - [Contracting and Purchasing Policy](#)
  - [Delegation of Signature Authority](#)
  - [Facilities and Administrative Cost Allocation Policy](#)
  - [Fraud, Waste, and Abuse Reporting Policy](#)
  - [Gifts, Awards, and Prizes from University Funds Policy](#)
  - [Purchasing Card Policy](#)
  - [Raffles and Door Prize Drawings Policy](#)
  - [Student Accounts Refund Policy](#)
  - [Student Fundraising Policy](#)
  - [Travel and Expense Reimbursement Policy](#)
  - [Tuition and Fee Approval Policy](#)
  - [Use of Institutional Funds Policy](#)

- Processes related to grants administration and internal controls
    - Processes for Postaward Grant Administration and Cost Principles for federally-funded projects
    - Project Budget and Expenditure Monitoring Processes for University Grants
- Board approved financial policies, state financial policies, or system financial policies
- University Endowment Spending Policy
  - University Endowment Investment Policy

## Human Resources

### Standard 2.F.1

*Faculty, staff, and administrators are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluation, retention, promotion, and termination.*

Willamette employees are informed of their employment conditions, responsibilities, and evaluation procedures at multiple points during their employment process. University employment policies cover topics such as workplace conduct, attendance and leave, occupational health and safety, accommodations and discrimination, remote work, whistleblower protections, and separation from employment.

Prospective and current employees can review policies via the [HR website](#), the [University Policies page](#) (which includes a dedicated Employment section), or individual faculty handbooks linked from the Policies page. Each position description specifies duties, work hours, location(s), and working conditions. New employees receive information about expectations, benefits, policies, and other employment conditions through [orientation activities](#), and ongoing training is provided via Willamette’s HRIS, Workday.

New or revised policies are circulated by the Policy Committee and, when appropriate, shared for community comment via the University newsletter, [Today@Willamette](#). Once implemented, policies are posted on the [University’s Policy Website](#). Time-sensitive communications from HR are sent via email or discussed in employee forums. All employees undergo an annual supervisor evaluation, with an optional self-evaluation. Completed evaluations are discussed with employees and uploaded to Workday.

Willamette’s five faculty bodies are also governed by personnel policies outlined in their respective handbooks. Each faculty handbook details expectations, rights, and responsibilities related to teaching, scholarship, service, and artistic creation, as well as evaluation and recommendation processes for retention, promotion, and termination. Policies vary by faculty body and faculty type, and are reviewed and refined regularly. Information on accessing each faculty handbook is provided in the supporting documents below.

Supporting documentation, Standard 2.F.1:

Human resource policies and procedures

- [Employee Attendance Policy](#)
- [Drug-Free Workplace Policy](#)
- [Professionalism in the Workplace Policy](#)
- [Investigation and Non-Retaliation Policy](#)
- [Occupational Safety and Health Policy](#)
- [Staff Separation from Employment Policy](#)
- [Whistleblower Policy](#)
- [Workplace Accommodation Policy](#)
- [Workplace Prohibited Discrimination and Harassment Policy](#)
- [Remote work for Non-Faculty Employees Policy](#)
- [Leaves of Absence Policy](#)
- [University Closure Policy for Staff](#)
- Annual non-Faculty Evaluation Forms
  - Annual Evaluation, Employee Self-Evaluation Form
  - Annual Evaluation, Supervisor Evaluation Form

Policies and procedures related to teaching, scholarship, service, and artistic creation

- [Willamette University Intellectual Property Policy](#)
- Faculty Policies, by faculty body
  - [Arts and Sciences Faculty Handbook](#), Personnel Policies and Procedures, Section 3
    - Tenured faculty: Section 3.3.1
    - Tenure-Track faculty: Section 3.3.2
    - Lecturers: Section 3.3.3
    - Visiting Faculty (full-time): Section 3.3.4
    - Visiting Faculty (part-time): Section 3.3.5
  - [AGSM Faculty Handbook](#)
    - Faculty Appointments: pages 3-4, section 2.1
    - Terms of Faculty Employment, pages 20-29, section 4
  - [SCIS Faculty Handbook](#)
    - Types of Appointments: Section 2.1
    - Terms of Faculty Appointment: Section 4
  - [Law Faculty Handbook](#)
    - Types of Appointments, Section IV
    - Policy of Academic Freedom and Responsibility, Section XIV
  - [PNCA Faculty Handbook](#)
    - Faculty Statement of Purpose: Section 2.3
    - Definition of PNCA Teaching Faculty: Section 2.4
    - Types of Faculty Appointments: Section 2.5
    - Administrative Appointments for Teaching Faculty: Section 2.6
    - Faculty Governance Roles: Section 4.B

Policies and procedures for apprising employees of working conditions, rights and responsibilities, evaluation, retention, promotion, and termination

- [Occupational Safety and Health Policy](#)
- Position Description Template
- [Separation from Employment Policy](#)
- Employee onboarding summary document

- Faculty Handbooks, by faculty body
  - [Arts and Sciences Faculty Handbook](#): Personnel Policies and Procedures, Section 3
    - Tenured faculty: Section 3.3.1
    - Tenure-Track faculty: Section 3.3.2
    - Lecturers: Section 3.3.3
    - Visiting Faculty (full-time): Section 3.3.4
    - Visiting Faculty (part-time): Section 3.3.5
  - [AGSM Faculty Handbook](#): Section 3
  - [SCIS Faculty Handbook](#): Section 2.1
  - [Law Faculty Handbook](#)
    - Contract Terms, Section VI
    - Termination of Untenured Faculty Members, Section VII
    - Evaluation of Tenured and Untenured Faculty, Section VIII
    - Promotion Policy, Section IX
    - Policy of Academic Tenure, Section X
    - Reduction in Force, Section XV
  - [PNCA Faculty Handbook](#)
    - Contract Terms: Section 2.7
    - Notification of Termination: Sections 2.9 and 2.10
    - Faculty Review System: Section 3

### Standard 2.F.2

*The institution provides faculty, staff, and administrators with appropriate opportunities and support for professional growth and development.*

Professional development activities at Willamette vary by employee type. Employees may submit professional development requests to their supervisors, outlining details about the proposed activity, justification in relation to duties or goals, and estimated costs. Division leaders and/or deans approve requests based on the merit of the proposal, division priorities, and available budget. Faculty professional development includes conferences, training, sabbaticals, and leaves of absence. Each faculty member's request is evaluated by a committee and then submitted to their respective dean for final approval. Procedures and criteria vary by faculty and are outlined in the faculty handbooks.

Human Resources leads a Supervisor Training at multiple points each year, which covers hiring and onboarding, compensation and payroll, time away from work, performance management, workplace accommodations, legal and risk management, and offboarding. HR is developing an online training program with best practices for recruiting, interviewing, and hiring.

Willamette employees are also eligible for professional development through the University's [tuition benefits program](#). Employees working 75% or more of a full-time schedule can receive subsidized tuition after six months of service for undergraduate courses and after three years of service for graduate courses. This benefit provides 100% tuition remission for one course per semester and 50% remission for additional courses,

with a graduate coursework limit of nine credit hours per semester. Employees must meet standard admission requirements and coordinate any schedule adjustments or time away from work with their supervisor.

In recent years, budgetary constraints have reduced funding for off-campus professional development. In response, deans and division leaders have prioritized alternative development opportunities, including online or regional activities, on-campus sessions, and peer-led professional networks.

Supporting documentation, Standard 2.F.2:

Employee professional development policies and procedures for faculty, staff, and administrators

- Professional Development process document
- Supervisor Training slide deck
- [Willamette University Benefits, Tuition Benefits](#)
- Faculty Handbooks, Sabbatical and Leave policies
  - [Law Faculty Handbook](#)
    - Sabbatical Leave, Section XI
    - Leave of Absence, Section XII
  - [AGSM Faculty Handbook](#)
    - Research Committee charge and process, Section 2.2.5
    - Sabbatical Leave, Section 4.5
    - Leave of Absence, Section 4.6
  - [Arts and Sciences Faculty Handbook](#)
    - Faculty Evaluations Committee, Section 4.1.6, Article VI
    - Sabbatical Leave, section 3.3.1(F)
    - Pre-Tenure Research Leave, section 3.3.2(I)
  - [SCIS Faculty Handbook](#)
    - Enrichment Committee charge, Section 2.2.3
    - Sabbatical Leave, Section 4.3
    - Leave of Absence, Section 4.4
  - [PNCA Faculty Handbook](#)
    - Sabbatical Leave Policy, Section 2.11
    - Leave of Absence Policy, section 2.13
    - Faculty Development Committee description, Section 4.c

Standard 2.F.3

*Consistent with its mission, programs, and services, the institution employs faculty, staff, and administrators sufficient in role, number, and qualifications to achieve its organizational responsibilities, educational objectives, establish and oversee academic policies, and ensure the integrity and continuity of its academic programs.*

As of August 2025 (Academic Year 2025–26), Willamette University employs 870 individuals (673 FTE) across the Salem and Portland campuses. This includes 196 full-time instructional faculty, 183 part-time instructional faculty, and 491 full-time and part-time staff in various operational units (e.g., management, finance, library and educational services, healthcare, service, administrative support, community and social services, arts, sports,

and computing operations). All tenure- and tenure-track faculty hold a terminal degree in their field and are actively engaged in research and publication. The student-to-faculty ratio in undergraduate programs is 12:1 at Willamette College and 10:1 at PNCA.

### *Employee Qualifications*

Willamette’s hiring process ensures that employees are carefully vetted and qualified to support the University’s mission. Most searches include first- and second-round interviews, with teaching demonstrations and research presentations required for tenure-track faculty. Hiring teams include members of the respective department/unit as well as individuals who regularly collaborate with that unit. Committees often use rubrics aligned with the position description, and Human Resources provides a Manager’s Toolkit to help committees craft interview questions that assess candidate qualifications.

### *Hiring Requests and Decisions*

All faculty and staff positions undergo a multi-step review and approval process. Hiring requests must first be discussed with unit and division leadership and the budget officer to determine needs and capacity. For staff, hiring considerations include student support, programmatic needs, and external compliance or reporting requirements. For faculty, deans review curricular needs, program development goals, and upcoming professional or personal leave. Additional guidance is provided in the faculty handbooks.

Once division-level approval is granted, departments submit a position description to Human Resources, which reviews qualifications and duties, benchmarks salary, and confirms funding with University Finance. Positions are then submitted to the Positions Committee, which meets weekly to approve, decline, or return positions for clarification. Decisions are based on available resources and institutional priorities, including program growth, recruitment and fundraising goals, and student support needs. Once final approval is granted, HR guides departments through the remainder of the hiring process.

#### Supporting documentation, Standard 2.F.3:

Documentation about engagement and responsibilities specified for faculty and staff, as appropriate

- Staffing Request and Requisition Form, which includes sections for duties, responsibilities, and minimum qualifications
- Faculty Handbooks and Hiring
  - [PNCA Faculty Handbook](#), Section 2.8
  - [Arts & Sciences Faculty Handbook](#): Section 4.3.1
  - [SCIS Faculty Handbook](#): Section 2.2.2.
  - [Law Faculty Handbook](#): Section V
  - [AGSM Faculty Handbook](#): Sections 2.1 and 3.2.6

Personnel hiring policies and procedures

- Hiring Process documentation
- Staffing Request and Requisition Form

Organization charts

- [Leadership Organizational Chart](#)

Policies and procedures for determining positions and anticipated resource allocation

- Staffing Request and Requisition Form, which includes guidance for those proposing positions to discuss necessity of position and effects on funding

#### Standard 2.F.4

*Faculty, staff, and administrators are evaluated regularly and systematically in alignment with institutional mission and goals, educational objectives, and policies and procedures.*

*Evaluations are based on written criteria that are published, easily accessible, and clearly communicated. Evaluations are applied equitably, fairly, and consistently in relation to responsibilities and duties. Personnel are assessed for effectiveness and are provided feedback and encouragement for improvement.*

Each Willamette University staff and administrator undergoes an annual evaluation that includes an optional self-evaluation and a required supervisor evaluation, both of which are discussed with the employee and their supervisor and uploaded to Willamette’s HRIS, Workday. These processes are outlined for managers in the Manager Toolkit on the Human Resources website—which is accessible to all Willamette University employees—and resources include a flowchart overview of the [Staff Performance Review Process](#), as well as a rubric for rating [Performance Review Basic Competencies](#). The employee evaluation process is coordinated and overseen by the Director of Human Resources.

Each of Willamette’s five faculty bodies are bound to additional personnel policies, which are outlined in their respective faculty handbooks. Each faculty handbook includes language regarding practices and expectations regarding evaluation, and recommendations for retention, promotion, and termination. These policies vary by faculty body—and, in some cases, by faculty type within each faculty body—and are reviewed and voted upon by the individual faculties.

#### Supporting documentation, Standard 2.F.4:

Administrator/staff/faculty evaluation policies and procedures

- [Staff Performance Review Process Flowchart](#)
- [Performance Review Basic Competencies Rating Rubric](#)
- Employee Self-Evaluation Template
- Supervisor Evaluation Template
- Faculty Handbook guidance on Performance Evaluations
  - [AGSM Faculty Handbook](#): Section 3.2
  - [Arts & Sciences Faculty Handbook](#): Sections 3.3.1.C, 3.3.2.E, 3.3.3.D, 3.3.4.B, and 3.3.5.B
  - [PNCA Faculty Handbook](#): Section 3
  - [SCIS Faculty Handbook](#): Section 3
  - [Law Faculty Handbook](#): Section VIII

## Student Support Resources

### Standard 2.G.1

*Consistent with the nature of its educational programs and methods of delivery, and with a particular focus on equity and closure of equity gaps in achievement, the institution creates and maintains effective learning environments with appropriate programs and services to support student learning and success.*

Willamette University provides a wide array of student support services designed to foster effective learning environments and promote student success. These services reflect the diverse needs of Willamette's student population and align with the University's mission and academic programs.

While many services are available to all students, some are tailored to specific disciplines (e.g., computing, quantitative reasoning, writing), student populations (graduate vs. undergraduate), or locations (Portland vs. Salem). This has resulted in some duplication in offices or functions, but most staff often maintain formal or dotted-line connections with colleagues performing similar roles across the University.

#### *Salem Campus, Willamette College Academic Support (undergraduate)*

- [Academic Advising and Resources](#) provides guidance on academic planning, major selection, and degree progress in collaboration with faculty advisors.
- [Academic Support](#) offers individual coaching and group workshops on topics such as time management, study skills, connecting with campus resources, academic policies, communicating with professors, and adjusting to college academic expectations. Some workshops are mandatory for students on Academic Warning, though other students may attend voluntarily.
- The [Learning Commons](#) is staffed by student tutors who are trained to build upon course lectures and content, and whose work is grounded in College Reading and Learning Association (CRLA) fundamentals. The Learning Commons offered nearly 2,400 hours of support in Academic Year 2024-25.
- The [Writing Center](#) provides individualized support to students at all stages of the writing process, across all disciplines.
- The [Quantitative Understanding, Analysis, and Design \(QUAD\) Center](#) offers tutoring and workshops to support math, science, and data literacy. Peer tutors at the QUAD Center also undergo training based in CRLA fundamentals.
- The [Digital Learning Studio](#) equips students with multimedia and digital tools for class projects, presentations, and creative work.

#### *Portland Campus, PNCA and HFSGS Academic Support (undergraduate and graduate)*

- Academic Coaching and workshops help students plan, connect with resources, and develop transferable skills.
- Open Studios offer a quiet and supportive environment for work on academic projects.

- A Writing Studio for undergraduate and graduate students to work on writing assignments and receive support from student Writing Specialists.
- An Academic Advisor helps incoming and undeclared students answer questions related to transfer, first-year registration, and major requirements.

*Salem Campus, School of Law (graduate)*

The Law School offers law-specific advising and academic support, dedicated career development and externship staff, and co-curricular organizations. The School also has a [Bar Examination and Accountability Support Team \(BEAST\)](#) that helps students prepare for the Bar exam by offering testing strategies, creating a study schedule, connecting them with faculty mentors, and providing on-campus study spaces and simulated exams.

*Salem and Portland Campuses, Atkinson Graduate School of Management (graduate)*

AGSM has assigned faculty advisors and a Records Analyst who provides additional mentorship and support for struggling students. Peer tutors are assigned to specific AGSM courses to provide additional out-of-class support with challenging material.

*Salem and Portland Campuses, School of Computing and Data Science (graduate)*

Students in Willamette’s graduate data science and computer science programs receive academic support through the QUAD Center and, occasionally, graduate teaching assistants. The Senior Director of Graduate and Professional Programs provides additional academic support for these students—many of whom are adult learners.

The [Office of Accessible Education Services \(AES\)](#) serves all Willamette students, ensuring equitable access to academic programs and services through consultation, individualized accommodations, and support planning. The Office’s [Alternative Testing Center](#) supports students requiring accommodated exam environments in coordination with faculty and academic departments. The [College Access Navigators](#) program provides advocacy and access services for neurodivergent students in the areas of executive functioning, self-regulation, social interaction, self-advocacy, and career preparation. Through the addition of these resources, as well as increased FTE, the AES has seen a 55% increase in undergraduate students utilizing academic accommodations since Willamette’s last self-study (data compares Fall 2019 to Fall 2025).

In the [Office of Student Affairs](#), an Assistant Dean for Community Care and Inclusion provides support to students struggling with their well-being and academic success. This individual helps students identify barriers to their success and strategies to overcome obstacles, directing them to additional resources, when needed. The Assistant Dean oversees Willamette’s CARE report submissions, serves as the facilitator of the University CARE team and case manager, administers the [emergency fund](#), and coordinates the response to [supporting students in times of crisis and emergencies](#). The Director of Student Care and Success at PNCA serves a similar role at PNCA.

### *Career Development and Experiential Learning*

Willamette's integrated career offices prepare students for professional success and lifelong learning. The [Office of Career Development](#) provides career coaching, internship and job search assistance, workshops, information sessions, employer engagement, and networking opportunities for undergraduate and graduate students in Willamette College, the School of Computing and Information Sciences, the Atkinson Graduate School of Management, and the Pacific Northwest College of Art (through their on-site [Office of Career Design](#)). Willamette also offers financial support for students seeking unpaid internships. The School of Law's [Career Planning and Development](#) staff support law students through one-on-one advising, job search support, and employer outreach.

There are a number of campus-based experiential learning opportunities for students, including the [Summer Collaborative Research Program](#) for faculty-mentored research in the sciences, the [Carson](#) and [College Colloquium](#) summer research grants, and an office of [Student Academic Grants and Awards](#) that connects students with on- and off-campus awards and fellowships. Many also engage students in their research programs.

### *Student Equity and Co-Curricular Support*

Willamette provides comprehensive co-curricular support that extends student learning beyond the classroom. Over [100 student-led clubs and organizations](#) promote engagement, while the [Office of Student Engagement and Leadership](#) provides mentorship and guidance to student leaders. The [Office of Civic Engagement](#) connects classroom learning to local community expertise, fostering students' sense of civic responsibility. As a Division III institution guided by a student-athlete philosophy, the [Athletics](#) program integrates academic and extracurricular development to support success on and off the field.

Other student support services include the [Gender Resource and Advocacy Center \(GRAC\)](#), which provides education, advocacy, and support related to gender identity, sexual orientation, and gender-based violence. The Director of the GRAC also serves as a confidential advocate for students who have experienced gender-based violence. The office of [Intercultural Engagement and Inclusion](#) provides students from all backgrounds with cultural resources and a welcoming space for community building. In the law school, the [Multicultural Law Students Association](#) similarly supports law students through networking, mentorship, and professional development.

### *Health, Wellness, and Safety Services*

Willamette addresses student well-being through holistic services that encompass physical health, psychological well-being, safety, and crisis response. The [Bishop Wellness Center](#) provides medical and mental health services, wellness education, and crisis intervention, with on-site facilities in Salem and telehealth options for Salem and Portland students. PNCA students have access to health coaching, education, and local resource connections through the [Office of Health Coaching and Education](#). Since joining the JED Campus Initiative in 2021, Willamette has participated in Healthy Minds Studies

(2021, 2024) and received a site visit from Jed Foundation Campus Partners (2022) to assess student mental health needs and inform service improvements. [Findings](#) from these assessments were published on the University website, and have been used to inform student support services around mental health and well-being.

The University's [CARE \(Concern, Assessment, Response, and Evaluation\) Team](#) responds to students experiencing challenges with well-being, academic performance, or concerning behavior through coordinated interventions. In 2022, CARE expanded to PNCA and graduate students, resulting in a steady increase in reports and support for the campus community. Additional online mechanisms allow students to report incidents of [sexual misconduct](#), [Title IX concerns](#), and [bias](#) to ensure prompt and equitable responses in compliance with federal regulations.

For students seeking pastoral and spiritual counseling, the University contracted with the United Methodist Church in August 2025 to provide a part-time University Chaplain. The Chaplain reports to the University Provost and will offer invocations at University functions by request, coordinate community response in times of crisis and celebration, serve as a resource for spiritual support, and build bridges with local faith communities to assist students with referrals to off-campus spiritual resources.

Finally, Willamette's [Campus Safety](#) program has teams in Salem and Portland campuses, and provides security services, community education, and 24/7 emergency response.

#### *Administration, Instructional Technology, and Learning Infrastructure*

The [Registrar's Office](#) maintains accurate academic records and provides accessible services for registration, transfer credit evaluation, degree audits, and graduation certification. [University Libraries](#)—including the Mark O. Hatfield Library, the PNCA/Solheim Library, and the Law Library—offer extensive print and digital collections, research support, and collaborative resources across schools. (For more detailed information about Willamette's library resources, see Standard 2.H.1.) Willamette adopted [Canvas](#) as its Learning Management System in 2022, which provides a user-friendly platform for course content, communication, and assessments. The [Digital Learning Studio](#) supports students and faculty with instructional technology, multimedia tools, and specialized software, while [Willamette Integrated Technology Services \(WITS\)](#) manages the University's information infrastructure and offers technical support to ensure a reliable environment for teaching, learning, and operations.

#### *Assessment of Student Support Services*

Many of Willamette's student support services conduct informal assessments of their work by tracking student participation, gathering formal and informal student feedback, and working with faculty and other campus partners to integrate that feedback into their services. The University has also received external funding to launch—and formally evaluate—some student support initiatives. Two examples include 1) the QUAD Center, initially funded by the Teagle Foundation and recently enhanced through a [USDE Title III](#)

[Strengthening Institutions grant](#), and 2) the STEM Scholars program, launched through a series of [NSF Scholarships in STEM \(or S-STEM\) grants](#). Formal evaluations of these programs have improved co-curricular support and allowed Willamette to extend best practices into courses and programs beyond the grants. Most notably, the S-STEM grant's embedded tutor model has been expanded to many first-year STEM courses.

*Case Study: Retention and Departure Process*

Willamette University is committed to creating effective learning environments that support student success, with particular attention to equity and closing achievement gaps. In 2023, the University formed a Retention Working Group to evaluate existing student persistence data, identify additional information needs, and examine best practices in student retention. Early work revealed inconsistent data on why students take leaves of absence or withdraw, limiting the University's ability to respond proactively and equitably.

To address this, Willamette launched a new [Leave of Absence and Exiting the University Policy](#) followed by a University-wide Departure Form in October 2023. This form collects qualitative data on students' reasons for leaving and enables them to request support or consultation. Each school now uses the form in its leave and exit processes; for example, law students must meet with the Associate Dean for Student Affairs and complete the form before taking a leave or withdrawing. Although new, the form is already providing insight into student needs and barriers, allowing the University to make informed decisions about additional support or resource allocation.

To enhance ongoing support and re-engagement, the Retention Working Group is developing a Leave of Absence Communication Plan and a Return to Campus Plan. These efforts aim to keep students connected while on leave and ensure a smooth transition back to academic life. The Communication Plan includes text-based reminders of deadlines and re-enrollment opportunities, while the Success Plan reconnects returning students with key staff, faculty, and resources.

Supporting documentation. Standard 2.G.1:

Listing of programs and services supporting student learning and success needs

- [Academic Success](#)
  - [Accessible Education](#)
  - [College Access Navigators](#)
  - [Alternative Testing Center](#)
  - [Center for Quantitative Understanding, Analysis, and Design \(QUAD Center\)](#)
  - [Learning Commons](#)
    - Training materials for student tutors
  - [Digital Learning Studio](#)
  - [Writing Center](#)

- [Academic Advising and Resources](#)
  - Advising Newsletter, September 3, 2024
  - Advising Newsletter, September 10, 2024
  - Advising Newsletter, January 14, 2025
  - Advising Newsletter, April 1, 2025
- [Academic Support Center \(PNCA\)](#)
- [Bar Examination and Accountability Support Team \(BEAST\)](#)
- Career Development and Experiential Learning
  - [Willamette University Career Development](#)
  - [Pacific Northwest College of Art Office of Career Design](#)
  - [Law Career Planning & Development](#)
  - [Student Academic Grants and Awards \(SAGA\)](#)
  - [Undergraduate Research Opportunities](#)
    - [Summer Collaborative Research Program](#)
- [Student Affairs](#)
  - [University Athletics](#)
  - [Fraternity and Sorority Life](#)
  - [Intercultural Engagement and Inclusion](#)
  - [Multicultural Law Students Association](#)
  - [Gender Advocacy and Resource Center \(GRAC\)](#)
  - [Students Organizing for Access to Resources \(SOAR\) Center](#)
  - [Student Engagement and Leadership \(SEAL\)](#)
- Health, Wellness, and Safety Services
  - [Bishop Wellness Center](#)
  - [JED Campus Initiative](#)
  - [Health Minds Study Results, 2021 and 2024](#)
  - [Supporting Students in Times of Concern and Emergencies. CARE Information](#)
  - [Sexual Misconduct and Title IX Resources](#)
  - [Campus Safety](#)
- Administration, Instructional Technology, and Learning Infrastructure
  - [Canvas Learning Management System](#)
  - [Willamette Integrated Technology Services](#)
  - [Registrar's Office](#)
  - [Libraries at Willamette University](#)
  - [Digital Learning Studio](#)

Assessment measures of effectiveness for programs and services

- 2024 QUAD Center Assessment Report (provided as part of report to USDE for Title III Strengthening Institutions grant)
- Departure and Leave of Absence work
  - University Departure Form
  - LOA Communication Plan
- S-STEM Program Assessments (provided as part of report to NSF for Scholarships in Science, Technology, Engineering, and Mathematics Program, or S-STEM, grant)
  - S-STEM Evaluation, 2021
  - S-STEM Evaluation, 2023
  - S-STEM Evaluation, 2024

## Standard 2.G.2

*The institution publishes in a catalog, or provides in a manner available to students and other stakeholders, current and accurate information that includes: institutional mission; admission requirements and procedures; grading policy; information on academic programs and courses, including degree and program completion requirements, expected learning outcomes, required course sequences, and projected timelines to completion based on normal student progress and the frequency of course offerings; names, titles, degrees held, and conferring institutions for administrators and full-time faculty; rules and regulations for conduct, rights, and responsibilities; tuition, fees, and other program costs; refund policies and procedures for students who withdraw from enrollment; opportunities and requirements for financial aid; and the academic calendar.*

[Willamette University's Catalog](#) and other published academic program materials are updated and archived annually to preserve historical academic information for students based on their year of entry. These documents include Willamette's mission; admission requirements and procedures; grading policies; academic program and course descriptions; degree and program requirements; expected learning outcomes; required course sequences; and typical timelines to completion based on course availability. It also lists the names, titles, academic degrees, and conferring institutions of senior administrators and full-time faculty. In conjunction with the University website, these publications also provide tuition and fees, refund policies, and financial aid information.

Prior to Academic Year 2025–26, Willamette's catalog represented academic program information for the College of Arts and Sciences (now Willamette College), while other academic units (AGSM and the School of Law) maintained individual student handbooks that served this function. Following the merger with PNCA in 2021, the addition of SCIS in 2022, and President Thorsett's strategic priority to promote greater University integration and a seamless student experience, Willamette adopted Coursedog's catalog platform in 2025 to consolidate all academic units and programs into a single, unified catalog. This platform aims to enhance clarity for students, families, and advisors; improve retrievability and archiving of University catalogs; support a consistent and integrated academic policy update process; and simplify reporting to external entities such as the U.S. Department of Veterans Affairs. Full and consistent adoption will likely take a few cycles, but the 2025 launch marks the first step toward a more integrated University catalog.

In addition to its home in the [University Catalog](#), Willamette's [Academic Calendar](#) is prominently displayed on the University website and includes dates for previous and upcoming academic years. Maintained by the University Registrar, the calendar includes key academic dates and can be sorted by Willamette's various student populations and academic programs.

### Supporting documentation, Standard 2.G.2:

Catalog (and/or other publications) that provides required information:

- [University Catalog](#)
- [Willamette Academic Calendar](#)

### Standard 2.G.3

*Publications and other written materials that describe educational programs include accurate information on national and/or state legal eligibility requirements for licensure or entry into an occupation or profession for which education and training are offered. Descriptions of unique requirements for employment and advancement in the occupation or profession shall be included in such materials.*

Willamette only offers one degree program, the Doctor of Jurisprudence (JD), that has affiliated licensure requirements. The University’s website includes information about [Bar Admission](#), as well as a consumer information/disclosures page that includes a section, [“Qualifications for Admission to the Bar.”](#) This outlines not only bar exam requirements, but also character, fitness, and other qualifications for admission to the bar in various jurisdictions, as well as links to external resources that maintain up-to-date details about these jurisdiction-level requirements. These resources are in compliance with the American Bar Association (ABA) Standard 504 regarding disclosures around licensure.

#### Supporting documentation, Standard 2.G.3:

Samples of publications and other written materials that describe accurate information on national and/or state legal eligibility requirements for licensure or entry into an occupation or profession for which education and training are offered. Descriptions of unique requirements for employment and advancement in the occupation or profession shall be included in such materials.

- [Willamette School of Law’s JD State Licensure and Certification Disclosure page](#)
- Willamette School of Law Consumer Information (Required ABA Disclosures) page, section [“Qualifications for admission to the bar.”](#)
- [Willamette School of Law Bar Admissions Information page](#)

A list of programs leading to fields with licensure requirements

- [Doctor of Jurisprudence](#)

### Standard 2.G.4

*The institution provides an effective and accountable program of financial aid consistent with its mission, student needs, and institutional resources. Information regarding the categories of financial assistance (such as scholarships, grants, and loans) is published and made available to prospective and enrolled students.*

In alignment with Willamette’s [Strategic Plan](#), which sets a goal to “educate students who reflect the full diversity of the region” by eliminating “barriers to access,” Willamette is deeply committed to providing financial aid packages that ensure that bright, qualified students do not forgo a Willamette University education because of their ability to pay for it. Nearly all Willamette University undergraduates receive some form of financial aid, and the awarding of scholarships—particularly at the undergraduate level—are based upon a series of tiered indexes that account for student need, academic merit, and co-curricular engagement.

### *Information regarding aid options*

Willamette's [Financial Aid website](#) provides an abundance of information about the financial aid process, including an [overview of aid mechanisms](#), as well as detailed information about a number of financial aid processes and policies, including:

- Net price calculators for both [Willamette College](#) and [PNCA](#)
- [Financial aid forms](#) and [timelines](#)
- A listing of [merit](#) and [competitive](#) scholarships
- Information regarding scholarships designated for undergraduate students transferring to [PNCA](#) and [Willamette College](#) as part of transfer pathway plans
- Loan information for both [undergraduate](#) and [graduate](#) students
- Aid information for [Veteran Students](#)
- Aid information for [Dual/Accelerated degree](#) students
- Guidance for [interpreting financial aid award letters](#)
- Definitions, policies, and requirements regarding Satisfactory Academic Progress (SAP) for scholarship recipients in both the [undergraduate](#) and [graduate](#) students
- Information about Willamette's participation in [Tuition Exchange Programs](#)

Students' financial aid letters also provide detailed information regarding the types of aid awarded, as well as tools to compare Willamette's aid package with those of other institutions. Admissions and financial aid counselors are located on the University's Salem and Portland campuses, and are available to meet with students and families to discuss opportunities for additional support.

### *Integrity in awarding student loans*

Willamette's Financial Aid team deploys a number of processes to ensure that the loans are made securely and accurately. Prior to being awarded federal student loans, students' identities are confirmed via database matches with the Social Security Administration and the Department of Homeland Security information provided in their FAFSA. If there are any questions or inconsistencies, Financial Aid staff follow up with the student to secure additional documentation before any loan funds are processed.

Once federal loans are awarded, student recipients are required to actively accept those loans and amounts, which is done by the student accessing Willamette's Financial Aid Self Service portal using their secure credentials. Once the loans have been fully accepted and processed, and the student has completed all other requirements (including enrollment), the loans are disbursed directly to their Willamette student account to offset tuition, fees, and other charges. If there is a resulting credit balance on the student's account, it is refunded to the student via direct deposit to their bank account or check (which may be collected in person or mailed to the student's address on file). After every loan disbursement, the Office of Financial Aid follows up with an email to the student, notifying them of the loan disbursement and advising them of their right to cancel the loan. In addition, the Office of Financial Aid reconciles all loan programs monthly to ensure proper reporting to the federal government.

### *Commitment to financial support*

Willamette’s financial aid programs have kept median debt for baccalaureate graduates under \$26,000 over the past 10 years—a figure at or below that of regional peers, particularly those with larger endowments. In Academic Year 2024–25, the University awarded approximately \$87 million in need- and merit-based aid to Willamette College and PNCA undergraduates. At Willamette College, 97% of full-time undergraduates received scholarships or grants, with 57% of full-time, first-year students receiving need-based aid packages averaging \$39,000. PNCA undergraduates received aid at comparable levels, with 98% of full-time students awarded scholarships or grants and 84% of full-time, first-year students receiving need-based aid, also averaging \$39,000. Much of this support is funded through philanthropic contributions; in July 2024, Willamette concluded its largest comprehensive fundraising campaign, securing \$64 million in commitments for financial aid endowments.

#### Supporting documentation, Standard 2.G.4:

Published financial aid policies and procedures including information about categories of financial assistance

- [Financial aid main page](#) (all students)
- [Types of Financial Aid](#) (all students)
- [Steps and deadlines to apply for Financial Aid](#) (all students)
  - [Financial aid forms](#) (all students)
- [Work Study Information](#)
- Undergraduate Student Aid Information
  - Net Price Calculators
    - [PNCA](#)
    - [Willamette College](#)
  - [Understanding/Accessing Financial Aid Letters](#)
  - Specific Scholarships
    - [Merit Aid Scholarships](#)
    - [Competitive Scholarships](#)
    - [Current Student Scholarships](#)
  - [Award Renewal and SAP](#)
  - [Tuition Exchange program information](#)
  - [Guidance on maintaining Satisfactory Academic Progress for scholarships and aid](#)
- Population-Specific Financial Aid Information
  - [Veterans Benefits](#)
  - [Dual Degree Financial Aid info](#)
  - Transfer student scholarships ([PNCA](#) and [Willamette College](#))
- [Graduate Programs: Overview of Financial Aid](#)
  - Graduate-specific [scholarships](#) and [loans](#)
  - [Award Renewal and Satisfactory Academic Progress](#), information on [SAP policies](#)
- [Student Accounts office information](#)
- Sample Financial Aid Award Letter

### Standard 2.G.5

*Students receiving financial assistance are informed of any repayment obligations. The institution regularly monitors its student loan programs and publicizes the institution's loan default rate on its website.*

Willamette currently boasts a 0% cohort default rate, achieved in part through clear and consistent financial aid awards and processing. The [Financial Aid website](#) includes information about various forms of aid available to students. For those needing to take out student loans, the website provides information about [undergraduate](#) and [graduate](#) loans—including the University's cohort default rate, available loan programs, federal loan terms and conditions, and repayment and exit counseling requirements.

Willamette determines loan eligibility through FAFSA submission. Undergraduate, degree-seeking students with financial need (e.g., whose SAI is less than the cost of attendance) are awarded Federal Subsidized Loans, whereas those with no financial need and graduate students submitting the FAFSA are awarded Federal Unsubsidized Loans. The University also awards Federal PLUS Loans to undergraduate students, by request (Parent PLUS) and to graduate students (Graduate PLUS) based upon their FAFSA submission. Students pursuing private loans apply directly to lenders, and Willamette verifies enrollment, tuition, FAFSA completion, and other aid before certifying and disbursing. While the Financial Aid Office does not recommend private lenders, it provides guidance on identifying hidden fees, comparing interest rates, and evaluating repayment options.

Upon admission and receipt of financial aid award, students receive a financial aid award letter detailing the types of aid awarded, cost of attendance, and definitions of grants, scholarships, loans, and payment plans. The letter also includes a financial aid comparison worksheet. To accept loans via the Financial Aid Self-Service Portal, students must complete a Master Promissory Note and [Entrance Counseling](#) through the federal site, using their secure Federal Student Aid ID (only the student can complete these steps). The University receives direct confirmation from the federal processor once these steps are completed.

The Financial Aid Office monitors continued loan eligibility annually via Willamette's student information system, Colleague—which provides information regarding enrollment status, financial aid file completion, and loan document completion. Students and authorized payers can view tuition, fees, charges, aid, and loans in Willamette's Bill+Pay system. As loans are disbursed, the Financial Aid Office notifies students of their right to cancel loans if desired.

Upon graduation or leaving the University, students must complete [federal student loan exit counseling](#) via [studentaid.gov](#), and the Financial Aid Office receives confirmation of completion. The office also receives annual updates from the federal government regarding loan default rates; given the University's low rate, follow-up is typically not

required. While the Perkins Loan Program was discontinued in 2017, Willamette continued collecting payments until fully transferring the portfolio to the Department of Education in FY25.

Supporting documentation, Standard 2.G.5:

Information to students regarding repayment obligations

- Master Promissory Note
- Sample Financial Aid Letter (information about repayment on “Definitions” page)

Policies and procedures for monitoring student loan programs

- Willamette Financial Aid Federal Loan Process Overview
- Willamette Financial Aid Private Loan Process Overview
- Willamette Financial Aid process document for confirming student loan recipient identities

Most recent loan default rate published on institutional website in accessible location

- [Undergraduate Loan Website](#), with default rate published in section, “Cohort Default Rate”
- [Graduate Loan Website](#), with default rate published in section, “Cohort Default Rate”

Sample letter to students regarding award and repayment obligations

- Sample Financial Aid Letter, with breakdown of aid by type, cost of attendance, definitions, and a financial aid comparison worksheet

Standard 2.G.6

*The institution designs, maintains, and evaluates a systematic and effective program of academic advisement to support student development and success. Personnel responsible for advising students are knowledgeable of the curriculum, program and graduation requirements, and are adequately prepared to successfully fulfill their responsibilities. Advising requirements and responsibilities of advisors are defined, published, and made available to students.*

Willamette University’s academic units offer advising support designed to promote student development and success in each of the University’s academic programs. Students, families, and faculty learn about Willamette’s advising processes and responsibilities through student and faculty handbooks, the University catalog, and program-specific webpages. Advisors across all academic units are knowledgeable about curriculum requirements, University policies, and support resources, and can refer students to specialist colleagues, as appropriate.

*Undergraduate Advising at Willamette College*

The Willamette College advising process begins with [first-year registration](#) in the summer before a student’s first semester of classes. Once students arrive on campus, their first-year seminar (or College Colloquium) faculty serve as their formal advisor until they declare a major no later than the end of their sophomore year. These faculty are trained to provide general information about Willamette College’s academic programs, general education, and campus support resources. Each Colloquium course is also paired with a Community-building, Health, and Academic Success Experience (CHASE) section—a

weekly class co-led by a staff member and a student Colloquium Associate—to help new students navigate the University. Once students declare a major, they work directly with a faculty advisor in that discipline who helps them plan to meet degree requirements and explore post-baccalaureate options. Advising processes, expectations, and checklists are available on the Advising website for [first-year](#), [transfer](#), and [current](#) students.

Willamette College also has two full-time professional staff who provide advising support. In addition to general advising, the Director of Advising works with students at risk of falling out of good academic standing, coordinates dual-degree advising, and serves on the CARE Team. The Director of Academic Support provides skill-based coaching, oversees peer tutors, serves on the CARE team, and connects students to campus resources.

The advising process at PNCA is similar to that at Willamette College. First-year students receive course scheduling and advising support from the Assistant Dean of Academic Success (faculty) and the Assistant Director of Academic Advising (staff). Once students declare their major, they work with a faculty advisor in their discipline to select courses and ensure progress toward graduation. In their senior year, students are assigned a Thesis Mentor to oversee their thesis project. PNCA's [advising webpage](#) outlines student and advisor responsibilities by year level, along with advising learning outcomes for each stage of the BFA program.

Students who are struggling with academic progress have access to academic coaching and peer tutors, and PNCA's advisors collaborate with the Salem-based Director of Academic Support around training and best practices.

### *Graduate Student Advising*

Willamette's graduate programs offer advising tailored to their students—many of whom are adult learners—and disciplinary requirements. Since many graduate programs feature a standardized first-year curriculum, students typically require minimal advising before starting classes. Once the semester begins, however, faculty advisors assist students in selecting courses that align with academic goals and degree requirements.

Willamette's graduate programs also employ specialized staff to support advising. The Law School's [Office of Student Services](#) provides academic advising and administration, and faculty advisors specialize in Bar exam preparation. The Atkinson Graduate School of Management (AGSM) offers orientation programs for [Early Career/Career Change](#) and [MBA for Professionals](#) students that introduce curriculum, expectations, and resources. AGSM's Recorder/Records Analyst supplements faculty advising with support for scheduling, registration, policies, and procedures. In the School of Computing and Information Sciences, the Senior Director of Graduate and Professional Programs assists with registration and academic standing concerns, while faculty advise graduate students, including those in dual-degree programs. Students in the Hallie Ford School of Graduate Studies are advised by faculty in their disciplines.

### *Advisor Training and Assessment*

All faculty and staff advising undergraduates receive training on graduation requirements. Undergraduate advisors are trained as generalists regarding general education (Willamette College), liberal arts (PNCA), and Foundation (PNCA) requirements. Adviser training also covers campus resources, FERPA, dual-degree programs, CARE reports, and Willamette's registration platform, SAGE.

Willamette College offers two faculty advisor workshops per year, and the Director of Advising sends advising newsletters to faculty throughout the semester with registration reminders, time-relevant information to support students, and policy updates. PNCA faculty advisors are required to attend annual (and in some years, bi-annual) training, which include overviews of faculty advisor responsibilities and proper protocol and procedures. PNCA's Assistant Director of Advising supports program chair training, conducts degree audit reporting, hosts PNCA's Majors and Minors Week, and serves on PNCA's Academic Wellness (persistence) and CARE teams.

Advising is considered a core faculty responsibility, and is evaluated as part of the tenure and promotion process for undergraduate faculty at Willamette College and PNCA.

#### [Arts & Sciences Faculty Handbook Excerpt](#) (Section C.1.c.i, page 5)

*It is expected that faculty will serve on University councils and committees, assume an equitable share of student advising, be accessible for consultations with students, and provide well-informed advice and assistance in helping students work toward the timely completion of their programs.*

#### [PNCA Faculty Handbook](#) (Section C)

*Participate in student advising including portfolio review, transfer audits and coordinating with the Assistant Dean of Academic Success and Assistant Director of Academic Advising on activities, events related to advising and major declaration (all faculty, regardless of role, will have advising assignments).*

In the graduate programs, specific faculty members are assigned as advisors and rotate through these responsibilities as part of service requirements. AGSM's Student Affairs Committee establishes guidelines and assignments for faculty advisors and supports continuous improvement in student-faculty-staff advising interactions.

#### Supporting documentation, Standard 2.G.6:

Description of advising program, staffing, and advising publications

- [PNCA Advising webpage](#), which includes PNCA's advising Mission Statement, as well as advisor and student responsibilities
- Willamette College Advising Websites, including population-specific pages for
  - [First-Year Students](#) and [First-Year Registration](#)
  - [Transfer Students](#)

- [Current Students](#)
  - [Law Office of Student Services](#)
  - [MBA Compass Week website](#)
  - [University Catalog](#) (see Policies for each unit)
- Description and evidence of systematic evaluation of advising
- [PNCA Faculty Handbook](#) (see Service to College & University)
  - [Arts & Sciences Faculty Handbook](#) (see Types of Faculty Appointments, Section 3.3.1)
- Professional development policies and procedures for advisors
- Training slides for Summer Registration Advisers, 2025
  - Advising Newsletter, September 3, 2024
  - Advising Newsletter, September 10, 2024
  - Advising Newsletter, January 14, 2025
  - Advising Newsletter, April 1, 2025

### Standard 2.G.7

*The institution maintains an effective identity verification process for students enrolled in distance education courses and programs to establish that the student enrolled in such a course or program is the same person whose achievements are evaluated and credentialed. The institution ensures that the identity verification process for distance education students protects student privacy and that students are informed, in writing at the time of enrollment, of current and projected charges associated with the identity verification process.*

Willamette University has long been a residential university, committed to combining an in-person classroom experience with integrated co-curricular and extracurricular opportunities. Prior to Willamette’s 2019 Evaluation of Institutional Effectiveness, the University did not offer any distance education courses. In recent years, however, Willamette has modestly expanded distance education in a few key areas.

First, after merging with PNCA in 2021, Willamette retained the Hallie Ford School of Graduate Studies’ two low-residency MFA programs in [Creative Writing](#) and [Visual Studies](#). These programs combine online and asynchronous coursework with intensive in-person residencies at the PNCA campus. Second, deans have begun using distance learning to expand specialized course offerings. For example, the School of Law offers a small number of specialized courses by engaging instructors who would not otherwise be available on campus. Finally, some for-credit externship courses meet online to ensure ongoing faculty consultation and discussion. In all cases, Willamette remains committed to regular, substantive faculty-student interaction, ensuring these courses are equal in quality to in-person offerings.

In adopting distance learning, Willamette’s deans have committed to a series of distance education principles and processes in compliance with NWCCU Standard 2.G.7. In 2025, the University joined NC-SARA to confirm adherence to state authorization requirements for distance education across member states. Also at that time, Willamette adopted a [Student Identity Verification in Distance Learning Policy](#) to formalize practices regarding identity verification, student privacy, and the disclosure of any related charges.

In accordance with this policy, Willamette verifies the identity of students enrolled in distance education courses through secure login credentials and learning management system (LMS) authentication. These practices are designed to ensure that the student who registers for a course or program is the same student who participates and receives academic credit. No additional fees for identity verification are currently assessed beyond standard tuition and technology fees.

Willamette has also codified practices around the assessment of these courses and programs. The law school ensures that its specialized distance education offerings comply with American Bar Association (ABA) standards, and that students in these courses are assessed using the same methods and standards as all other JD courses. Similarly, PNCA's low-residency MFA programs and all of the University's individual distance education courses are reviewed and assessed alongside all other degree programs and course offerings at Willamette.

As Willamette expands distance education opportunities, these frameworks will allow the University to maintain academic integrity and quality while broadening access to new learners.

Supporting documentation, Standard 2.G.7:

[Student Identity Verification in Distance Learning Policy](#) meets the following requirements:

- Policies/procedures for ensuring the student who registers in a distance education course/program is the same student who participates in the course and receives credit
- Policies/procedures make it clear that identity verification processes protect student privacy
- Notification to students at the time of registration of any additional charges associated with verification procedures

Academic policies/procedures for instructors to implement requirements for regular and substantive interaction in distance education courses/programs

- Willamette's Distance Education Process

## Library and Information Resources

### Standard 2.H.1

*Consistent with its mission, the institution employs qualified personnel and provides access to library and information resources with a level of currency, depth, and breadth sufficient to support and sustain the institution's mission, programs, and services.*

The University Libraries system comprises the [Mark O. Hatfield Library](#) in Salem, the [Albert Solheim Library](#) at PNCA, the [University Archives](#) in Salem, and the [J.W. Long Law Library](#) (which is administratively separate from the other University libraries). Each library curates collections and services tailored to the distinct academic units it supports. All four entities participate in cooperative purchasing, an integrated library system, shared licensing, facilitated referrals, and coordinated staff training and policy development to meet the research needs of the University community.

Across its locations, the University's libraries provide access to over 900,000 monographic and government document titles (in print and digital formats), 180 databases, more than 150,000 journal titles, and curated digital image and streaming video collections. Willamette is also a member of the [Orbis Cascade Alliance](#), a regional consortium of 38 academic institutions. Through this partnership, students and faculty have access to more than 22 million items via the Alliance's shared catalog, Summit, typically delivered within two business days. This membership expands access to resources, reduces duplication to better leverage funds, and allows for data-informed collection decisions. Items not available in-house, electronically, or through the Alliance are obtained quickly through Interlibrary Loan.

Willamette's libraries are overseen by a [University Librarian](#) with over 20 years' experience, and are staffed by professionally qualified librarians and staff committed to advancing the Library's [mission](#) "to foster learning, critical thinking, scholarship, creativity, and personal growth within the spirit of the University's mission, values, and core themes." The Long Library has three staff librarians, PNCA's Solheim library has three staff librarians, and the Hatfield Library has eleven librarians across its collections, teaching, research, access services, learning experience design, administration, systems, and technical services divisions. Two additional librarians staff the University Archives.

Library services and collections are shaped by active engagement with faculty and students. Most monograph purchases are made in direct response to faculty requests or as a result of the liaisons' review of departmental curricula and faculty research needs, and the Long Library's Collection Development Policy also ensures its fulfillment with ABA Standard 606 and AALS Library Governance Standards 6-8. The University Librarian signs off on all new course proposals to ensure that sufficient information resources are available to meet curricular needs, and the [Liaison Program](#) allows librarians to maintain close relationships with academic departments and their curricula, which means that they can provide tailored research consultations, curriculum development support, and instruction sessions that help to develop students' research and critical thinking skills in the context of course content. Students also contribute to the development of library services through feedback provided during research consultations and instructional sessions. Library staff use circulation and usage data to guide decisions on subscription renewals, collection development, and resource optimization.

To assess its services, the University Libraries administered the [Measuring Information Services Outcomes \(MISO\)](#) survey in 2021 and 2025 to measure user satisfaction and benchmark performance against peer institutions. Survey responses showed that Willamette students consistently rated Libraries' services, spaces, and collections above the peer average in both satisfaction and importance. Faculty satisfaction was also high, with opportunities for improvement identified in expanding course-integrated instruction and database access—both received favorable scores above 3.4 on a 4.0 scale.

Finally, the University Archives and Special Collections further support Willamette’s mission by collecting and preserving institutional records and unique primary source materials relevant to the Pacific Northwest—many of which are also digitally accessible. The Archives also features two distinctive collections: a [Political Papers](#) collection that features papers, photographs, memorabilia, and audiovisual materials of elected individuals representing Oregon at the state and national level (including the rare senatorial and gubernatorial collections of Mark O. Hatfield), and the [Pacific Northwest Artists Archive \(PNAA\)](#), a collection of materials related to the careers of artists who are or were active in Oregon and Washington for the majority of their careers. (The PNAA collections complement the artistic works of many of these individuals held in Willamette’s [Hallie Ford Museum of Art](#).)

Supporting documentation, Standard 2.H.1:

Procedures for assessing adequacy of library collections

- [Collection Development Policy](#)
- [Description of the Orbis Cascade Alliance’s collection development process](#)
- Willamette Law Library Collection Development Policy and Philosophy
- MISO Library Satisfaction Survey Summary

Library planning committee and procedures for planning and collection development

- [Procedures for faculty to request additions to the Libraries’ Collections](#)
- [Description of Mark O. Hatfield Library Liaison Program](#)
- [WU Library Title Request form](#)

Library instruction plan, policies, and/or procedures

- [Description of Library Instruction Programs and Offerings](#)
- [Research Guides](#) page, with information about how to find information by subject, use research tools, and connect with library staff via in-person or online consultations

Library staffing information, policies, and/or procedures

- [Description of Mark O. Hatfield Library Liaison Program](#)

## Physical and Technological Infrastructure

### Standard 2.I.1

*Consistent with its mission, the institution creates and maintains physical facilities and technology infrastructure that are accessible, safe, secure, and sufficient in quantity and quality to ensure healthful learning and working environments that support and sustain the institution’s mission, academic programs, and services.*

#### *University Facilities and Physical Infrastructure*

Willamette University comprises two campuses in Salem and Portland, Oregon. The Salem campus—located just south of the Oregon State Capitol complex—spans 60 acres with 38 buildings totaling over 1.4 million gross square feet. Of this, 598,000 square feet are academic, 489,000 are residential, and 334,000 are administrative, athletic, and common spaces. In addition, the Salem campus includes the Zena property—a 303 acre area nestled in the Eola Hills west of Salem (about 10 miles northwest of the Salem campus). The Zena property is the largest continuous stretch of forest in the area with a

diverse landscape of oak and mixed woodlands, riparian zones, grasslands, and freshwater habitats, and is used by students, faculty, and staff for research, activities, and restorative recreation.

The Portland campus includes the Pacific Northwest College of Art (PNCA) as well as the Willamette University Graduate and Professional Center (WUGPC). PNCA encompasses 174,000 square feet in three buildings: the Arlene and Harold Schnitzer Center for Art and Design (which houses most of PNCA's classrooms), the Glass Building (which houses 3D shops and labs), and ArtHouse (a student housing complex). The PNCA campus includes academic and residential spaces, including classrooms, studios, labs, shops, galleries, residences, common spaces, and a library. The WUGPC is a 9,000-square-foot facility that houses classrooms, study areas, and offices. It serves graduate programs in Management, Data Science, Computer Science, and Creative Writing, and also hosts University events.

### *Facilities Maintenance*

In recent years, the University has used debt refinancing to complete \$27.4 million in deferred maintenance—including mechanical, electrical, plumbing, roofing, safety systems, IT upgrades, and a boiler plant decentralization project. An additional \$2.6 million in deferred maintenance projects are underway. Willamette also has a number of capital improvements planned for the next two years, including a donor-funded instructional and event space at Zena Farm, a campus-wide LED lighting upgrade, and synthetic turf and sports lighting for baseball and softball fields.

There have also been a number of recent facilities improvements to classrooms and learning spaces. Since the last self-study, the University has relocated bound periodicals from the Mark O. Hatfield Library to off-site storage, freeing over 2,200 square feet for study space while retaining on-demand retrieval. Classroom spaces have been remodeled in the Kaneko building, the new Portland-based WUGPC, and West Annex buildings to provide improved classroom environments for the MBA, graduate data science, and exercise science students, respectively (although other programs and courses also use these facilities). Finally, in Summer/Fall 2025, the first floor of the Putnam University Center will be renovated to expand and relocate the Career Development office to a central, more visible location.

Since 2019, the Facilities team has used AssetPlanner to manage, track, and prioritize projects across both campuses. The system incorporates a Facility Condition Index to rank projects by safety, operational impact, cost-effectiveness, and alignment with University planning. All major projects, with costs, funding sources, and timelines, are presented to the Board of Trustees for approval. Since adoption, the team has completed over 35,000 work orders and currently has fewer than 100 open.

Willamette's facilities maintenance is guided by a set of sustainability principles that include goals, metrics, and procedures related to energy efficiency, recycling, the use of

environmentally-friendly products, water efficiency, and lower-impact HVAC systems. The University's grounds have long been accredited for organic care practices by [Oregon Tilth](#), and Facilities conducts continuous inspections of campus facilities for compliance with product use, storage, and disposal procedures.

#### *Accessibility, Safety, and Security of University Facilities*

The University has implemented a number of efforts to ensure the accessibility, security, and safety of Willamette's facilities—as well as an array of campus policies related to safety, security, emergency response, and hazards.

Many campus facilities have automatic door openers to comply with ADA accessibility requirements, and the facilities team has worked to eliminate accessibility issues on campus sidewalks, driveways, parking areas, landings, and approaches. A few remaining campus buildings require substantial renovations to achieve ADA compliance and therefore are not used as classroom or event spaces.

To ensure security on the campus grounds, campus security officers patrol the Salem and Portland campuses at all hours. All facilities have proximity card ID programmable access entry systems on their primary entrances, and Campus Safety has the capability to remotely lock down each campus facility. Like many campuses, Willamette has a robust “Code Blue” emergency call station system with push-button access to Campus Safety responders, and security cameras have been installed in many areas on campus.

The Facilities team regularly requests OSHA consultations, fire inspections, and structural engineering assessments. If an unsafe condition is found, staff take immediate action to “safe off” the area. Campus community members are encouraged to report unsafe conditions directly to Campus Safety or Facilities, whose staff are trained to manage emergency calls. The University's Facilities Safety Committee meets monthly—and after recordable incidents—to discuss concerns, maintain records, and schedule training.

To minimize hazardous waste, the University follows a Hazardous Waste Management Plan that outlines typical waste types and disposal methods. The Chemical Hygiene Officer maintains records and submits annual DEQ reports. To date, Willamette has reduced hazardous waste generation enough to qualify as a “[Small Quantity Generator](#)” under EPA standards and is working toward full reclassification.

#### *Willamette's Technology Infrastructure*

Willamette maintains and continually improves its physical and technology infrastructure to ensure environments that effectively support teaching, learning, and the broader campus community. The University's technology planning is guided by a three-year Technology Roadmap, which has been shaped by input from cross-functional governance committees such as the Information Technology Advisory Committee (ITAC) and the Academic Technology Advisory Committee (ATAC). The roadmap emphasizes modernization, simplification of systems, and improved service delivery, and it will be

further formalized with the establishment of an IT Project Management Office in Academic Year 2025–26. A recent ERP/SIS discovery initiative has also informed longer-term planning, using the current state of systems as a baseline to evaluate needs and explore new solutions.

Willamette’s cybersecurity efforts are robust and proactive. A formal Cybersecurity Incident Response [Policy](#) and Plan guide institutional preparedness and response. All employees complete annual cybersecurity training, updated with new content each year, and delivered through Workday’s professional development platform. The University also frequently conducts phishing campaigns throughout the year to raise awareness, and employees who fail these simulations are required to complete individual training. The University partners with an external XDR provider, Solis, for advanced threat detection and response, and hosts additional training through events like tabletop exercises and [WU Tech Day](#) to further strengthen campus readiness.

Since joining Willamette in 2023, the VP for Information Technology and CIO has expanded governance structures to improve transparency and engagement across academic and administrative areas. ITAC provides institution-wide strategic and operational guidance, while ATAC focuses on academic alignment. Together, these groups ensure technology decisions reflect community needs.

The University continues to invest in infrastructure, classroom technology refresh cycles, network modernization, and user-focused service redesign. These investments support secure, reliable, and accessible environments with better connectivity, system reliability, and integration of accessibility tools and cloud resources. The addition of Google AI tools further enhances the learning environment and supports the evolving needs of students, faculty, and staff.

Supporting documentation, Standard 2.I.1:

Equipment replacement policies and procedures

- Facilities Management Sustainability Principles

Procedures for assessing sufficiency of physical facilities

- Deferred Maintenance Projects Completed 2021-25
- [Projects Website, 2021-2024](#)

Policies and procedures for ensuring accessible, safe, and secure facilities

- Ensuring Accessible, Safe, and Secure Facilities
- [Exterior Lighting Replacement Plan](#)
- Related Policies and/or Protocol
  - [Facility Use Policy](#)
  - [Security Camera Policy](#)
  - [Firearm/Weapons Policy](#)
  - [Unmanned Aircraft System Policy](#)
  - [Facilities Management Key Control Policy](#)
  - [Virus and Infectious Disease Response Protocol](#)

- [Energy Policy](#)
- [Kaneko Emergency Generator Fueling Policy](#)
- [Facilities Management Flood Response Plan](#)

Policies and procedures for the use, storage, and disposal of hazardous waste

- Academic Chemical Hygiene Officer Job Description
- Hazardous Waste Management Plan
- [Fats, Oil, and Grease Policy](#)
- [Kaneko Gen Set Accidental Spill Policy](#)
- [Storm Drain and Refuse Area Cleaning](#)
- [Pesticide Use at Ford Hall Bioplanters](#)

Technology master plan and planning processes

- Technology Road Map, Academic Years 2024-27

[Link to Clery Annual Security Report posted on website](#)

Cybersecurity Policies and Procedures

- [Cybersecurity Incident Response Policy](#)
- Cybersecurity Incident Response Plan

## Moving Forward

As our Year Six Policies, Regulations, and Financial Review report makes clear, Willamette University is in a time of adaptation and transition, and the University will undertake significant work in the twelve months ahead of our Year Seven Evaluation of Institutional Effectiveness Report. In addition to the core work of educating students across six academic units, the following initiatives will be central to our operations, strategy, and planning in Academic Year 2025-26.

### *Navigate Leadership Transitions and Governance Structures*

As noted in the 2025 Annual Report, Willamette is undergoing several administrative changes. In Fall 2024, COO and VP for Financial Affairs Dan Valles accepted a position at Albion College, and AVP Anne Gallagher was promoted to VP of Finance. In Spring 2025, Dean Ruth Feingold accepted a position at Grinnell College, and Associate Provost for Institutional Research Kelley Strawn was appointed Interim Dean of Arts and Sciences. Most recently, in Summer 2025, Provost and Senior VP for Academic Affairs Carol Long retired after more than forty years of service, and Jennifer Henderson—formerly Vice Provost at Trinity University—joined Willamette as University Provost in July 2025.

These transitions prompted both leadership changes and administrative restructuring. In Summer 2025, President Thorsett reorganized enrollment and information technology, which now report to the Provost and the VP/General Counsel, respectively. Feingold's departure also enabled formal restructuring of Willamette College, with Interim Dean Strawn leading the Arts and Sciences faculty and Provost Henderson charged with developing an academic governance structure for Willamette College that brings together faculty from Arts and Sciences, Computing and Information Sciences, and Atkinson—all of whom contribute to the undergraduate curriculum. This is a complex undertaking given each faculty's distinct governance traditions and curricular histories, but Provost Henderson brings relevant experience from Trinity University.

### *Launch New General Education Program at PNCA*

Over the past two years, PNCA's undergraduate faculty have developed a new general education program, scheduled for full implementation in Fall 2026. The program shifts PNCA's general education from a traditional liberal arts model to an integrated studies framework that bridges disciplines, emphasizes applied practice, and builds career resilience by connecting learning to real-world contexts. The program is organized around seven learning outcomes: creative analysis, creative discipline fluency, information and media literacy, quantitative reasoning, communication and storytelling, social + civic + community practice, and creative entrepreneurship + career resilience. Faculty will begin piloting new courses and assessment tools beginning in Fall 2025, with full adoption in Academic Year 2026–27.

### *Continued work in Academic Program Assessment*

Willamette’s undergraduate faculties have advanced student learning assessment following recommendations from the 2019 Self-Study. Assessment committees at PNCA and Willamette College now provide tools, training, and feedback to support faculty in evaluation and continuous improvement. The Arts and Sciences faculty relaunched its external peer evaluation program, with visits to Physics and History in 2024–25 and Sociology and International Studies in 2025-26.

The Computing and Information Sciences and Atkinson faculties are likewise refining assessment in undergraduate business, computer science, data science, and statistics. Given these programs’ cross-unit integration and dual undergraduate/graduate responsibilities, their curricula have undergone more extensive revision than other Willamette College programs, and their learning assessment and continuous improvement processes reflect this reality. These faculty are now finalizing and piloting assessment processes, with preliminary results to be shared in the Year Seven self-study.

### *New Program Development*

In alignment with the [2022 Strategic Plan](#)’s goal to create programs responsive to student demand and regional workforce needs, Willamette has launched 18 new degree programs or pathways since the 2019 Self-Study. Additional programs are currently in development (with future requests to NWCCU pending), and others planned to launch before the 2026 Year Seven Evaluation of Institutional Effectiveness Report and Site Visit.

<b>Program Name</b>	<b>Approved by NWCCU?</b>	<b>Planned Launch</b>
BS in Computer Science (revised to meet ABET req’ts)	Yes	Fall 2025
BA in Computer Science (non-ABET curriculum)	Yes	Fall 2025
BA in Musical Theatre	Yes	Fall 2025
BA/BS + MFA (3+2) Pathway	n/a	Fall 2025
STEM-Designated MBA (1- and 2-year options)	Yes	Fall 2025
MS in Accounting and Finance	Yes	Fall 2026
BFA in Interaction Design	No	Fall 2027
BS in Industrial Engineering and Operations Research	Yes	Fall 2026
MDes in Design	No	Fall 2027
MFA in Illustration	No	Fall 2028

### *Continue Implementing Willamette’s Strategic Plan*

Willamette continues to monitor the implementation of its [Strategic Plan](#), which guides the University in responding to changing student needs and regional workforce demands while ensuring long-term sustainability. Over the past three years, leadership has refined the plan in light of demographic shifts, financial constraints, and technological changes—emphasizing fiscal stability, strategic program growth, and operational efficiency. Throughout these adjustments, the University remains committed to its mission and to advancing programs that leverage the strengths of its integrated liberal and professional curriculum to serve the economic, cultural, and social needs of the Northwest.