Policies, Regulations and Finances Review
Pacific Lutheran University
March 1, 2024

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Part 1: Mission Fulfillment Executive Summary

The mission of Pacific Lutheran University is to *"educate students for lives of thoughtful inquiry, service, leadership and care – for other people, for their communities, and for the earth"*. Our framing of Mission Fulfillment includes three key areas: Vision and Strategic Planning; Core Themes and Key Indicators; and Continuous Improvement. This vision of mission fulfillment is expressed in a one page summary as well as in the 2021 Mid-cycle Report. A brief description and update in each area is provided below.

Vision and Strategic Planning

Completed in 2020, the current University Strategic Plan is entering its fifth and final year of operation. The plan, organized around four overarching themes and corresponding goals: identity and messaging, environment and well-being, innovation and change, and resources and stewardship, has led to a variety of improvements and changes across the university – some of which are articulated in this report. With the creation of the Office of Institutional Effectiveness (a commitment made in our Mid-cycle Report) we have better implemented annual strategic goals that align to our strategic plan and help to define and focus campus wide strategy each academic year. The Strategic Plan as well as the stated annual initiatives are also aligned to other key planning documents and frameworks including the Diversity and Inclusion Strategic Plan, the Academic Identity Statement and the Seven Actions for Institutional Equity and Anti-Racism. We no longer explicitly call out the Strategic Enrollment Management Plan as one of these documents as it was significantly disrupted with changes to enrollment trends during and following the global Covid-19 pandemic. However, a series of innovative, responsive, and proactive admission and financial aid practices - such as our auto admit, tuition guarantee and pathway programs – have resulted in an upward trend in both applications and admissions over the past two years.

Core Themes and Key Indicators

As an institution we chose to retain Core Themes and Key Indicators as a critical element of our efforts around mission fulfillment. Unlike strategic planning which reflects a series of priorities at a moment in time, the Core Themes are intended to reflect our most enduring values and commitments and to impact and influence both operational and strategic decision making. Core Themes are also expressed in terms of the student experience - centering student achievement, well-being, and success at their core and in their measurements of achievement. Our core themes include: A Challenging Academic Experience, A Community of Care and A Culture of Service and Leadership. Programs and achievements that have emerged from these themes will be a central focus of the year seven Institutional Effectiveness report.

Continuous Improvement

Continuous Improvement rounds out the third area of Mission Fulfillment. Intentional efforts to reflect on our performance as individuals and as an institution are essential if we are to move the needle on realizing our mission as intended. This area has posed some of our largest challenges and has also seen some of our greatest gains. We have experienced significant

improvement in periodic program review, especially in the academic division. Improving both our capacity and sophistication in Institutional Research and Analytics is gradually impacting our collective understanding of our performance in critical areas through the use of timely and more sophisticated data analysis and presentation. An example of this is our publicly facing dynamic dashboards that highlight student success data. In partnership with the Board of Regents, the development and implementation of the Presidential Assessment system is another significant improvement in this area. Simultaneously, we are focusing energy on developing a more meaningful and effective staff evaluation system and in "closing loops" in annual and periodic reviews and other assessment efforts to better evaluate progress and improve the impact of our collective efforts.

Part 2: Eligibility Requirements

1. **OPERATIONAL STATUS:** Founded in 1890 as Pacific Lutheran College, PLU is in its 135th continual year of operation as an institution of higher education.
2. **OPERATIONAL FOCUS AND INDEPENDENCE:** Pacific Lutheran University is an independent, comprehensive, private university focused on traditional undergraduate and graduate education across a full array of academic disciplines and professions.
3. **AUTHORITY:** Pacific Lutheran University is authorized by the State of Washington and the Northwest Commission on Colleges and Universities (NWCCU) as a higher education degree granting institution.
4. **INSTITUTIONAL EFFECTIVENESS:** Evidence of effectiveness and planning is made publicly available via the university web page. Additional planning and effectiveness details are embedded throughout this and previous accreditation reports. Key performance metrics and planning documents are linked via the [Office of the President](#) and the [Office of Institutional Effectiveness](#).
5. **STUDENT LEARNING:** Student learning is at the center of the institution's mission. Evidence of attainment of student learning is the primary focus of the most recent Mid-Cycle Report and the year seven Institutional Effectiveness Report.
6. **STUDENT ACHIEVEMENT:** Student achievement is reported annually to IPEDs and common indicators of achievement, including comparisons to peer institutions, are available as part of three [publicly available dashboards](#) maintained by Institutional Research and Analytics.
7. **NON-DISCRIMINATION:** As evidenced in the legal documents, and supported through numerous policies, procedures and practice, Pacific Lutheran University respects all those who are in the community. The nondiscrimination policy is public and published. https://www.plu.edu/personnel-manual/general-human-resources-policies/non-discrimination policy/
8. **INSTITUTIONAL INTEGRITY:** See Standards 2.D.1, 2.D.2 and 2.D.3
9. **GOVERNING BOARD:** Pacific Lutheran University has a Board of Regents that functions at the highest level of appropriate oversight and participates fully in setting policy direction, providing advice and counsel for the campus community, and reviewing the mission and core themes for progress and fulfillment. The Board consists of up to 37 members, of whom only the president has a contractual relationship with the university. See Standard 2.A.1 & 2.A.4
10. **CHIEF EXECUTIVE OFFICER:** The president, a full-time employee, is the chief executive officer of Pacific Lutheran University. By virtue of the Bylaws, the president may not chair the Board of Regents. The current president is L. Allan Belton. See Standard 2.A.3
11. **ADMINISTRATION:** In addition to the president, the university employs four vice presidents, including the senior vice president and provost, who oversee the administrative divisions of the university (one vice presidential position is currently vacant, and an active search is underway). Staff members within these divisions represent those areas important for university management. PLU personnel work

collaboratively across institutional functions and units to foster fulfillment of PLU's mission and achievement core themes. See Standard 2.A.2

12. **FACULTY:** The faculty core is full-time and professionally qualified. The faculty-student ratio is 1:12. Faculty members are evaluated following a system in accord with NWCCU standards, established by the faculty, and described in detail in the faculty handbook. The faculty oversees the academic program.

13. **EDUCATIONAL PROGRAMS:** The university maintains undergraduate, graduate and certificate programs. These program details are maintained on the NWCCU portal and are described in the University Catalog, updated annually.

14. **LIBRARY AND INFORMATION RESOURCES:** See Standard 2.H.1.

15. **PHYSICAL AND TECHNOLOGY INFRASTRUCTURE:** See Standard 2.I.1

16. **ACADEMIC FREEDOM:** Academic freedom is a founding and core principle of Lutheran Higher Education. Faculty and students are encouraged to explore all subjects of knowledge. Academic freedom policies exist for faculty and students. See Standards 2.B.1 & 2.B.2.

17. **ADMISSIONS:** Undergraduate student admission policy is published in the Catalog and on the admission website. Graduate admission policies for the programs are also found in the Catalog and on the programs' websites. See Standard 2.C.3

18. **PUBLIC INFORMATION:** The university maintains a robust and accurate website overseen by a dedicated team within the Marketing and Communications department. The university posts accurate information on the website, including the Catalog; mission statement; admission and graduation requirements; and student, faculty, and staff policies. These policies are linked in connection to NWCCU standards throughout this report.

19. **FINANCIAL RESOURCES AND PLANNING:** See Standard 2.E.1, 2.E.2, 2.E.3

20. **FINANCIAL ACCOUNTABILITY:** The financial records of the university are audited annually by Moss Adams, LLP. The audit contains an unqualified opinion on the financial statements.

21. **DISCLOSURE:** The Northwest Commission on Colleges and Universities is apprised of appropriate changes at the university through the submission of substantive change requests and annual reports.

22. **RELATIONSHIP WITH NWCCU:** The university accepts the standards and related policies of the Commission and agrees to comply with these as currently stated or as modified. Further, the institution agrees that the Commission may make known the nature of any action regarding PLU's status.

23. **INSTITUTIONAL CAPACITY:** evidence of institutional capacity sufficient to fulfill and sustain our mission relates to NWCCU standards and is provided throughout this report.

Part 3: Standard 2 Review

Standard 2.A - 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.

The university is governed by a Board of Regents composed of no more than 35 individuals (Bylaws - Article 4.3). Regents are elected by the Member Representatives of the Corporation at the annual meeting, with nominations from the University Alumni Association and the Regents themselves. No less than one-half of the total number of regents are from the membership of the Evangelical Lutheran Church in America (three must be rostered leaders), with three of the six bishops in Region 1 also serving as voting members. Remaining regents are comprised of up to three graduates of PLU and regents-at-large. The president is a voting member of the Board.

The Board meets three times a year, generally in October, February, and May. Board meetings may be called in person or virtually. Board decisions are made in Board plenary sessions, except when the Board-authorized Executive Committee makes a Board decision between regularly scheduled Board meetings. This authority, granted in the Board Bylaws (Article 4.18.1), is of two kinds: when the Board has given the Executive Committee the authority to make the decisions and when some unforeseen decision must be made in very short order (Board Bylaws Article 4.11). These seldom occur.

The Board of Regents regularly reviews or approves university policy as granted in the Bylaws. The Board hears reports and approves appointments to high level administrative positions including vice presidents, deans, and department and program chairs, in addition to approving faculty promotion and tenure and reviewing sabbatical reports. The Board approves the annual budget at the May meeting and hears progress reports throughout the year. Audit reports are also presented to the Board for approval. These authorities and responsibilities are outlined in Article 4 of the Bylaws. Board actions come to the full Board via the committee structure, of which there are eight committees: academic affairs; budget, finance, audit and compliance; enrollment and student life; executive; governance; investment; real property; and university relations. The Board continually reviews the Bylaws and the committee structure of the Board

itself. The current committee structure was enacted in 2011 and committee charters are regularly reviewed.

The Board also oversees the review of the President and engages in a self-assessment of board performance and individual member performance annually via web-based surveys. Presidential Assessment was significantly revised in 2022 with the first full cycle of the expanded evaluation occurring in 2023. The process is overseen by the executive committee and is supported by the Office of Institutional Effectiveness and the President's Council. Board performance and individual board member evaluation has occurred since 1997. The results of these processes are reviewed by the governance committee of the Board. The board can also elect to retreat as part of a scheduled Board meeting to engage in self-reflection. The board is currently evaluating questions about its size, composition and functions which could result in changes between the year six and the year seven NWCCU reports.

PLU maintains clear lines of authority and responsibility as indicated in the [Articles of Incorporation and Bylaws](), the [Faculty Constitution & Bylaws](), [Faculty Handbook](), and the [Associated Students of Pacific Lutheran University Bylaws]().

> **Evidence Summary:**
> [Board of Regents Roster]()
> [Bylaws of the Board of Regents]()
> [Articles of Incorporation]()
> [Faculty Constitution and Bylaws]()
> [Faculty Handbook]()
> [ASPLU Overview]()

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.*

The university's leadership is managed by the Executive Council which is composed of the University President, four Vice Presidents and the Associate Vice President for Institutional Effectiveness. The [Executive Council (EC)]() serves as the primary decision-making body for the university. In addition to the Executive Council, a larger group, the [President's Council](), serves a critical leadership function as it assists with planning, assessing and strategizing around institutional goals and strategic priorities. The members of the Executive Council and additional representatives from all five Divisions of the institution comprise the President's Council. The Executive Cabinet and the President's Council each meet twice per month on opposite weeks, which allows for a regular flow of communication and business to occur. The groups also engage extended retreat sessions four to six times during the academic year for in-depth planning and reflection as well as professional and leadership development.

Evidence Summary:
> [President's Council Roster (2023-2024)](#)
> [Leadership organizational chart](#)
> [Qualifications of executive leadership](#)

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.*

The president, a full-time employee, is the chief executive officer of Pacific Lutheran University. By virtue of the Bylaws, the president may not chair the Board of Regents. The current president is [L. Allan Belton](#), in his 11th year at the university and 8th year as President. The [President's performance](#) is reviewed annually by the Board of Regents.

Evidence Summary:
> [Qualifications of the President](#)
> [Presidential Assessment criteria and evaluation process](#)

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.*

Shared Governance

PLU takes pride in a highly collaborative and robust shared governance system. The authority, structure and working relationships between and among the faculty, board, administration, staff, and students are clearly and transparently described in the University Bylaws and Faculty Handbook. Faculty, administrators, staff, and students have prescribed avenues of communication with the Board of Regents to ensure representation (See Standard 2.A.1). Faculty Bylaws describe a structure of broad faculty authority in partnership with the Board of Regents in the establishment and elimination of academic units, degree programs and governance structures among other things. Action items and decisions stemming from Board of Regents meetings are shared with the full university community following each board meeting [(sample communication)](#).

As part of a robust system of [faculty governance](#), the Faculty at PLU participate in a full faculty assembly model that is inclusive of all faculty ranks and years of service. The Assembly meets monthly throughout the academic year, with the option to cancel if no new business is required. This allows all faculty members to participate in deliberations and decisions for which they are responsible or for which their voice is established within the [Faculty Bylaws](#). In this

assembly format, faculty have options to engage Question and Answer sessions with the President, deliberate on substantive issues through informal discussions or vote on formal motions. To be added to the assembly agenda, matters of curriculum, academic calendars, governance, rank and tenure policies and procedures and other business may be submitted to the Faculty Executive Committee (composed of the chair and vice chair of the Faculty and the chairs of all standing committees, with the president and provost as advisory members) by any standing committee or any group of three or more faculty. The faculty chair is a member of the President's Council, and four elected faculty officers are advisory members of the Board of Regents.

Staff are represented through the PLU Staff Council on a variety of university committees and working groups. The Chair of the Staff Council is also an advisory member of the President's Council and the Board of Regents.

Students are represented in shared governance through the Associated Students of Pacific Lutheran University. ASPLU officers are advisory members to the Board of Regents and represent student voice and interest on multiple standing faculty and university committees.

> **Evidence Summary:**
> Staff Council
> Associated Students of Pacific Lutheran University (ASPLU)
> Faculty Handbook - University Standing Committees
> Sample Campus Communication from Board of Regents meeting

Standard 2.B. - 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.*

Academic freedom is highly prized at PLU. Faculty Personnel Policies "are grounded in the belief that the protection of academic freedom by tenure has as its operationally central provision the right to teach freely yet responsibly in one's discipline." Mechanisms for handling complaints about violation of academic freedom exist within the faculty governance structure. The administration protects faculty from outside interference in their academic freedom.
The university considers the defense and cultivation of academic freedom to be integral to its mission and a practice that flows from its Lutheran heritage. Academic freedom is explicitly referenced in Article III, Section 1 of the Faculty Constitution and By-laws Procedures for disciplining or dismissing a faculty member also are written to guarantee that such actions are not violations of academic freedom.

In 2015, the faculty formally approved the [Principles of Academic Freedom](#) based on the AAUP Statement of Principles on Academic Freedom (1940). The motion resolves to formally affirm the following Principles of Academic Freedom from the AAUP Statement:

1. Teachers have the freedom to conduct research and publish their findings, as long as they fulfill their other academic duties. Any research for financial gain should be conducted in coordination with the institution.
2. Teachers have the freedom to discuss their subject matter in the classroom but should refrain from introducing unrelated controversial topics.
3. College and university teachers have multiple roles as citizens, members of a learned profession, and officers of an educational institution. They should enjoy freedom of speech as citizens but must recognize their special obligations as scholars and educational officers. They should maintain accuracy, exercise appropriate restraint, respect others' opinions, and clarify when their statements do not represent the institution's views.

In the context of political challenges to academic freedom, the PLU Board of Regents approved a reaffirmation of the essential value of academic freedom in [May of 2022](#).

> **Evidence Summary:**
> [Faculty Personnel Policy](#)
> [Article III, Section 1 Faculty Constitution and ByLaws](#)
> [Principles of Academic Freedom](#)
> [Reaffirmation from Board of Regents, May 2022](#)

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.*

The promotion and protection of independent thought is long rooted in the Lutheran higher education tradition. As an institution, this commitment is clearly expressed in several key documents aimed at faculty, staff, and students alike. The [Academic Identity Statement of Pacific Lutheran University](#) (PLU) directly connects to Standard 2.B.2 by emphasizing the promotion of an environment that supports independent thought and the pursuit of knowledge. Our academic identity aligns with our mission to educate students for lives of thoughtful inquiry, service, leadership, and care. The university values learning in the liberal arts tradition and purposefully integrates liberal arts with professional studies, encouraging students to engage in thoughtful inquiry and test their assumptions and to share their

scholarship and reasoned conclusions with others. Our mission and core themes also commit us to leadership and care which calls us to support independent thought in the pursuit and dissemination of knowledge, while upholding principles of diversity, inclusion, social justice, and sustainability. By integrating these core elements of Lutheran Higher Education, PLU fosters a comprehensive and intellectually enriching educational experience in line with Standard 2.B.2.

The [Principles of Academic Freedom at Pacific Lutheran University](#) (PLU) also directly aligns with Standard 2.B.2. PLU, within the context of its mission and values, actively fosters an environment that upholds independent thought in the pursuit and dissemination of knowledge. The policy acknowledges and embraces academic freedom as a central principle of the academy, consistent with the Lutheran tradition of higher education. By formally affirming the AAUP Statement's Principles on Academic Freedom, PLU ensures that faculty, staff, administrators, and students have the freedom to share their scholarly work and reasoned conclusions without censorship or interference. The motion also emphasizes the multiple roles of college and university teachers as citizens, members of a learned profession, and officers of an educational institution. It underscores the importance of intellectual freedom and encourages the rigorous examination of all knowledge, theories, perspectives, and truths, even as individuals within the institution may hold diverse personal, social, or religious beliefs. In this way, PLU demonstrates its commitment to upholding and safeguarding academic freedom within its academic community. Academic Freedom is also explicitly called out in the [Faculty Personnel Policy](#).

The [Freedom of Expression](#) student conduct policy also affirms the rights of students to exercise freedom of expression and to participate responsibly in the freedoms of membership in a democratic society.

> **Evidence Summary:**
> [Faculty Personnel Policy](#)
> [Principles of Academic Freedom](#)
> [Freedom of Expression - Student Code of Conduct](#)
> [PLU's Academic Identity Statement](#)

Standard C - 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.*

The PLU Registrar's Office is responsible for enforcing transfer of credit academic policy. All evaluation and awarding of credit is done by the Registrar's Office under policies and procedures that ensure fairness to all students including policies for transfer admissions, evaluation of credits, and college level credits. The Registrar's Office evaluates over 2,000 courses per year. Credit from other regionally accredited colleges or universities are normally transferable to facilitate mobility of students between institutions. Credit from other institutions, including foreign colleges or universities, is awarded on a case-by case basis, and includes consultation with the appropriate academic departments, use of outside credit evaluators (for some foreign colleges or universities), and the professional judgment of the Registrar's Office. PLU academic departments review the courses for direct equivalency to PLU courses. Courses from colleges or universities that are not deemed directly equivalent are reviewed by the Registrar's Office and with the support of the Core Curriculum Committee.

PLU equivalent course credit and coursework for majors and minors is determined by the individual schools and departments. In select cases transfer agreements with specific 2-year colleges exist. The Registrar's Office determines transferability of courses to meet General Education elements. The PLU Catalog clearly states how credit is awarded and the maximum number of transferable hours in each category. In addition, tools like the Interactive Transfer Guide and PLU Transfer Equivalencies Guide are available to assist current and prospective students in understanding the transferability of courses.

 Graduate Programs retain transfer for credit policies appropriate for their program(s). Policies are described in the respective Graduate Courses and Degrees section of the PLU Catalog.

> **Evidence Summary:**
> PLU Catalog – Transfer Admission Policy
> PLU Catalog – Evaluation of Credits Process
> PLU Transfer Equivalencies Guide
> Interactive Transfer Guide
> College-Level Credit Policies
> Graduate Program Policies (Catalog)
> Graduate Courses and Degrees
> WA 2 Year Transfer Pathways

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.*

Policies and procedures governing students' rights and responsibilities are contained in the PLU Student Code of Conduct and the Student Rights and Responsibilities Process. Both are posted on the PLU website with hard copies available on request. A specific website is also maintained to help parents and families easily identify and locate needed policies and procedures. The

[Student Rights and Responsibilities Office](#) is housed in the office of the Dean of Students. The Dean of Students, Title IX Coordinator, and Associate Director of Campus Life oversees the annual training of review officers and ensures that the policies and procedures are administered in a fair and consistent manner. The policies and procedures are reviewed annually and the process for changing student policies is described in the procedures. The Student Code of Conduct and Procedures, including policies regarding [Academic Integrity](#), are sent to the students at the beginning of each semester through an all-student email with the web link embedded.

The Office of Accessibility and Support Services is overseen by the Director of Accessibility and Wellbeing Services and is part of Wellbeing Services and Resources within the Division of Student Life. The policies and procedures regarding students' rights and responsibilities as they pertain to [accommodations](#) are clearly posted on the website which also describes available support and services.

> **Evidence Summary:**
> [Student Code of Conduct](#)
> [Student Rights and Responsibilities Process](#) (including [appeals and grievance procedures](#))
> [Academic Integrity](#)
> [Accommodations for persons with disabilities](#)
> [Parent and family webpage](#)

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.*

The university seeks to annually enroll a well-qualified student body that has the capacity to flourish academically and in a variety of areas of campus life. Recruitment and admission practices target students who are academically prepared for the rigors of the classroom and co-curricular life, as well as students who are willing to benefit from the support of faculty and staff and are who are well qualified to facilitate individual growth and success. Additionally, the recruitment and admission process targets students with the ability and desire to both lead and serve others. Students with these characteristics lift up the PLU mission and positively impact the overall student body. [Minimum requirements for admission](#) are listed in the Catalog and on the [admission website](#).

Admission policies and standards rest with the faculty. This is exercised for the undergraduate program through faculty committees such as the Educational Policies Committee, as well as through the full Faculty Assembly. For example, the faculty approved a motion to move to a test optional admission process in 2018. The dean of admission ensures that admission policies are followed as in the admission process.

Undergraduate students' abilities are assessed holistically at the time of admission. PLU employs a process by which student needs are met by way of academic advising and appropriate course placement. The orientation for all new students includes modules for academic preparation. A specific placement exam is given to undergraduate students for mathematics, as appropriate. While there is no placement exam for world languages, students are presented with a placement guide to determine the course that is suitable for them. Academic progression policies are clearly communicated in the undergraduate and graduate sections of the Catalog. Academic warning, probation, dismissal, and petition for reinstatement are covered. PLU staff and faculty adhere to these policies which provide students clear guidance.

Graduate admission standards are set by the individual graduate programs in consultation with the graduate office.

> **Evidence Summary:**
> Undergraduate Academic Policies and Procedures including academic standing,progression, dismissal and readmission (Catalog)
> Undergraduate Admission (Catalog)
> Graduate Admission Policies and Procedures (Catalog)
> Undergraduate Admission Criteria (website)
> Graduate Admission Criteria (by program) (website)
> Math Placement Policies and Procedures (website)
> Language Placement Guide
> Academic Advising

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.*

The university securely maintains electronic student academic records in its student information system and on its internal network. Record backups are performed nightly. The Office of Student Financial Services maintains and secures student financial records. Confidentiality of records is safeguarded through electronic and physical access review and approval protocols, as well as with faculty and staff training. The university FERPA policy is included in the PLU Catalog. Faculty and staff receive FERPA training at the time of hire and

receive annual reminders of the key components of the policy. Student office assistants are trained by their supervisors to the standards of FERPA.

The policies regarding privacy, confidentiality, and release of student records are published on the Registrar's Office website and in the Student Code of Conduct. Offices with records that are protected by other state or federal laws and guidelines give information about records to students seeking the services of those offices. Faculty, staff and students are notified of the FERPA policy at the beginning of each academic year via email. Offices such as the Health Center, Counseling Services and the Office of Accessibility and Accommodation follow additional guidelines established by state law and HIPAA, as relevant.

> **Evidence Summary:**
>> FERPA Policy
>> I&TS Privacy and Document Retention
>>> Document Retention
>>> Disclosure of Information (Including Personal Data) Retained Electronically
>>> PLU Network Services
>> I&TS Data Classification, Access Control, & Security Policies
>>> Definitions, Roles, & Responsibilities
>>> Network Access and Security
>>> General Network and Data Security Practices
>>> Data Classification and Control
>>> Outsourcing and External Party Access
>>> Mobile Devices and Remote Storage
>>> Incident Management and Response

Standard D - 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.*

University publications are reviewed on an on-going basis, first to ensure that they are consistent with the University core messages, and second that they portray factual information. Marketing and Communications holds the primary responsibility to ensure that core messages

are incorporated appropriately, while individuals are responsible for keeping their publications current. As part of on-going communications, the University highlights its [brand story online](#) - including reference to mission and the five PLU attributes - the traits all lutes - students, faculty, staff, alumni - embody every day. The discernment and creation of the brand attributes marks and achievement set forth in the Identity and Messaging theme of the current strategic plan which challenged us to articulate a clearer and more consistent representation of who we are as an institution.

Marketing & Communications also plays a convening role in the annual creation and review of [admission](#) materials and alumni outreach, ensuring that the same core messaging is consistent through the welcoming of new students through constituent engagement. Internal policies guide equity-centered working principles. There are also extensive content guides for content development professionals, including Social Media Guidelines and Planning, an annual Marketing Plan, and references for academic areas, etc. Marketing and Communications is represented on the President's Council through both the Vice President for University Relations and the AVP for Marketing and Communications

Communication about academic programs to students is done primarily through the Web, including the on-line catalog which is updated annually. The [General Education](#) website clearly articulates the requirements for that portion of an undergraduate student's program. Four-year advising guides exist for all undergraduate majors. They may be accessed from departmental web pages or in the [My Academic Pathway](#) portion of the academic advising website. Graduate students are able to access accurate program information through the individual program or [graduate admission](#) websites.

In addition, the university makes public key information about student enrollment, retention and graduation rates through a series of [public dashboards](#) that also provide peer comparison and disaggregated data.

> **Evidence Summary:**
> [Marketing and Communication](#)
> [Admission](#)
> [General Education](#)
> [My Academic Pathway](#)
> [Graduate Admission](#)
> [Public Dashboards](#)

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.*

Students, staff, faculty, and members of the Board of Regents are governed by and follow their respective bylaws, codes of conduct, and policies for operations. PLU has in place policies required by law and many additional policies for the university community. For faculty, staff, and administrators the Standards of Personal Conduct in the Personnel Manual define acceptable behavior. The Student Handbook provides relevant guidance for students. Each of these documents is intended to ensure a high standard of ethical care in management and operations.

Specific policies governing the faculty are found in the Faculty Handbook, which is published online and updated routinely when new policies or procedures are approved or enacted. The faculty, through the Faculty Handbook, have two pathways for consideration of grievances, as well as specific procedures for consideration of dismissal and misconduct in science. Ethical guidelines for the treatment of human and animal research subjects are also outlined in the Faculty Handbook. The Student Code of Conduct governs expectations for students both in and out of the classroom and the Faculty Handbook also identifies clear policy regarding academic integrity.

In addition, non-discrimination policies related to Title IX of the Education Amendments Act of 1972 are found on the Title IX Website and are available to all employees and students.

> **Evidence Summary:**
> Student Code of Conduct
> PLU Personnel Manual
> > Personnel Manual, Arbitration -
> > Personnel Manual, Grievance Policies
> > Personnel Manual, Policy on Sexual Misconduct
> > Personnel Manual, Policy on Discriminatory Harassment
> > Personnel Manual, Policy on Equal Opportunity
> Title IX Policies and Procedures
> PLU Faculty Handbook
> > Academic Integrity
> > Grievances
> > Dismissal
> > Misconduct in Science
> > Research on Human Subjects
> > Research on Animal Subjects

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.*

The [PLU conflict of interest policy](#) pertains to members of the Board of Regents and to those employed by the university in positions of significant responsibility and authority. The policy is freely available to all within the Personnel Manual and is distributed annually to members of the Board and to approximately one hundred administrators. The signed [Regent Disclosure Form](#) is maintained in the Office of the President. Administrator forms are maintained by Human Resources in individual personnel files.

> **Evidence Summary:**
> [Conflict of Interest Policy](#)
> [Board of Regents Disclosure Form](#)

Standard E - 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.*

Pacific Lutheran University undergoes an annual external audit performed by Forvis, LLP in accordance with generally accepted auditing standards. Forvis is a full-service accounting and advisory firm whose specialized professionals offer clear industry insight. The external audit covers PLU's overall accounting and controls as well as additional analysis as required by Title 2 U.S. Code of Federal Regulations(CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, covering grants and financial aid received from the federal government.

The audit requires two weeks of field work and typically begins about six weeks after the end of the fiscal year on May 31. The audited financial statements are typically accepted by the Board's Audit Committee and to be presented to the full Board of Regents at their October meeting. Prior to leaving campus at the end of their field work, the audit partners will have an exit interview to discuss any concerns discovered during testing to be expressed in a management letter. Included in the acceptance process by the Audit Committee is the management letter with the findings and recommendations. Management letters spanning the timeframe of this report have not included any findings or recommendations.

An accounting of cash flow, revenue, contracts/grants, investments and endowments are provided to the NWCCU annually as part of the revised annual reporting process and all recent [Audited Financial statements](#) (including management letter, cash flow statements, endowment & investment reporting and significant grant reporting) are publicly available online.

Additionally, the Budget, Finance, Audit and Compliance (BFAC) committee of the Board of Regents receives no fewer than four (4) financial updates each fiscal year plus an additional meeting to review the audited financial statements when the timing of the completed audit does not coincide with a regularly scheduled Board of Regents meeting. The Board of Regents bylaws state:

> The purpose of the Budget, Finance, Audit and Compliance Committee of the Board of Regents of Pacific Lutheran University shall be to (1) assist the Board of Regents in stewardship of the overall financial welfare of the University; (2) oversee the University's long-range financial planning; (3) coordinate financial management, annual budgets, accounting, property transactions, insurance, annuities and trusts, and debt financing; and (4) assist the Board of Regents of the University with respect to the Regents' oversight of integrity of the University's financial statements; compliance by the University with legal and regulatory requirements; independence and performance of the University's internal and external audit functions; and the assessment of litigation and regulatory risks. The Committee shall also perform any related functions as may be assigned to it by the Board of Regents.

> The purpose of the Investment Committee of the Board of Regents of Pacific Lutheran University shall be to: (1) oversee the endowment funds and other investment assets of the University with a goals of providing a stable base of assets for the University and guiding the strategy for investment of the University's investment assets to produce income to assist the University to accomplish its mission; and (2) perform such related functions as may be assigned to it by the Board of Regents.

> The full Board of Regents bylaws and the BFAC Charter are available upon request.

In addition to formal auditing processes, the university maintains a robust set of contract and risk management services, policies and procedures to ensure both the responsible management of fiscal resources by all members of campus as well as to mitigate any risks that could result in a financial burden or loss for the institution.

In addition, the Office of Sponsored Programs seeks and manages grant funding for key strategic initiatives, as well as individual faculty research. Since inception in 2020, the office has submitted 145 proposals requesting over $35M in funding. In that same period, PLU received 95 new grants, totaling over $13M. The Office of Advancement has responsibility for securing all forms of financial gifts to the university. Unrestricted giving (PLU Fund) continues to be a challenge for PLU and our peers. Across the sector, individual giving is declining (fewer households making donations) and major gifts continue to drive philanthropic activity. With recent reductions to staffing and resources dedicated toward securing unrestricted funds, our primary goal is to maintain as much stability as possible. Philanthropic engagement has been focused primarily on securing funding to support upgrades to the natural sciences building and laboratory spaces. To date, $4.525M in grant funding has been awarded in support of this multi-year strategic project.

Evidence Summary:
Financial Services

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.

Financial Planning Policies and Processes

The authority to adopt budgets, set tuition, and obligate university assets belongs to the Board of Regents. The Board is organized into committees that include BFAC, whose statement of purpose is noted above in Standard 2.E.1

Documents are prepared before each Board meeting to inform the entire Board of the status of financial activities for the current fiscal year. The Board also receives reports on the progress of building the budget for the upcoming year. Discussion of these reports takes place in the committee meeting, with the chair of the committee then reporting to the entire Board.

Board meetings are scheduled three times per year: fall, winter, and spring. At the fall meeting the Board authorizes tuition/fees and room/meal charges for the next academic year based on recommendations of the administration.

PLU is continually in the process of building and managing the annual budget. Each year the institution faces tradeoffs between the costs of running a strong institution and keeping tuition affordable for our students. The division of Administrative Services is responsible for institution-wide budget planning. This planning includes assumptions about enrollment, tuition revenue, salary pools, benefit increases, expenditures for services and purchases, capital improvements, equipment, and debt service.

The university gains broad-based input through several standing committees at the university. Each year, the university Budget Advisory Committee reviews budget assumptions and works to refine them. The committee has ex officio members representing three major faculty committees, student government, staff, college budget heads, and appropriate administrative support. The Budget Advisory Committee is chaired by the head of Finance and meets monthly during the academic year.

Other campus committees providing input to the university budget and spending practices include Benefits, Faculty Affairs, Administrative Staff Council, and Capital Expenditures committees. The university Capital Expenditures Committee collects, evaluates, and sets priorities for annual capital projects. This committee does the same for equipment requests.

These committees are broad-based and representative of the university community, and members are encouraged to work for the good of the entire community. Committee priorities are presented to the President's Council for review and approval. The provost and the Chief Administrative Officer work with each of the committees in establishing priorities for the upcoming year.

At the spring meeting of the Board, the Budget, Finance, Audit, and Compliance Committee reviews the proposed operating budget for the upcoming fiscal year as presented by the university administration to ensure that the budget is consistent with the long-range financial plan and the mission of the university. After review and such adjustments as the committee may deem appropriate, the committee recommends a proposed operating budget to the Board of Regents for approval. The approved operating budget constitutes spending authority to the university administration to incur operating costs, subject to the policies and procedures adopted by the Board.

Capital Budgets
The university uses its committee structure to assess both annual capital improvements and equipment needs. Each fall, a call is made to all departments to submit requests which are then distributed to either the provost or the respective vice presidents for prioritization. Requests then go to the Capital Expenditures Committee which makes recommendations to the President's Council.

The university maintains a campus master plan based on ongoing assessment of strategic priorities, departmental and programmatic needs.

The university's most recent uses of debt financing were in 2006 and 2014, and then again in 2016 when previous 2006 debt was refinanced. The current debt is $52 million, with an annual debt service of $3.3 million and is manageable within the current university budget. Standard and Poor re-evaluates the university's bond rating annually.

> **Evidence Summary:**
> Audited financial statements (including management letter, cash flow statements, endowment & investment reporting and significant grant reporting)
> Faculty Handbook University Standing Committees
> Budget and Finance
> Capital Expenditures

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.*

In addition to the specific governance structure, policy and evidence provided above in Standards 2.E.1 and 2.E.2, the university ensures timely and accurate information using Ellucian Banner as the enterprise-wide software system which has been in place since 1996. Banner allows all transactions to be viewed by department program leaders at any time via the online Banner Self Service. The information included on this webpage is the adjusted budget, year to date actual expenditures, encumbrances for purchase orders, and the available budget remaining. The information is presented by line item and can be drilled down to individual transactions. All transactions are in real time and are kept current. In addition, a nimbler visual dashboard with program and department budget tracking and projections is under development with a goal of providing even greater ease and transparency to budget tracking for all executive leadership and budget managers (target implementation is FY 25).

Accounting is included in the finance function (Office of Financial Services) and follows the generally accepted accounting principles required by the Financial Accounting Standards Board (FASB). As detailed in 2.F.7, an opinion on our financial statements is expressed annually by an independent auditing firm as noted above. This annual audit also includes an examination of our internal controls. No deficiencies have been reported.

The overall university operating budget is analyzed monthly and is compared to the same date in the prior year. This comparative report is shared with the President's Council monthly and to the Board of Regents at every meeting.

> **Evidence Summary:**
> Sample Banner budget page
> Financial Services

Standard F - 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.*

All employees are apprised of their conditions of employment. New faculty members participate in an orientation program that introduces them to the Faculty Handbook and its contents (including personnel policies and employment benefits, requirements for tenure and promotion and grievance and dismissal policies). All faculty contracts contain pertinent employment information for the year. New staff participate in an orientation program and are

provided access to the [Personnel Manual](#) and specific policies regarding benefits. The orientation programming is solid, and the information is readily available on the Provost and HR websites. Modifications to content and how information is provided are made when necessary to provide updates or better serve the community.

> **Evidence Summary:**
> [Personnel Manual](#)
> [Faculty Personnel Policies and Employment Benefits](#) - Faculty Handbook
> [Rank and Tenure and Leaves of Absence](#) - Faculty Handbook
> [Grievance and Dismissal Policies](#) - Faculty Handbook

Standard 2.F.2

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

The university has some identified programs in place for training and development of staff. Resources to support faculty development, broadly defined, are provided within each College's budget. Tenured and tenure track faculty have the option of rolling over unused funds for three consecutive years as needed to best support off-campus opportunities that may involve travel or other higher expenses. Limited funding is also available to support staff development within the academic divisions.

All faculty and staff have access to ongoing training and development opportunities. Information and Technology Services regularly offers technology classes https://www.plu.edu/itech/workshops/) and the university contracts with Archbright (https://www.archbright.com/) for professional workshop opportunities. In addition, workshops/trainings dedicated to personal and professional growth such as Supervisor Academy and Personal and Professional Development Day are periodically provided. Finally, an extended and more in-depth opportunity, the [Wild Hope faculty development seminars](#) for staff have resumed in 2024 after a short hiatus during the pandemic.

The Office of the Provost provides on-going professional development for faculty. All new faculty have a robust 2-day faculty orientation before fall semester, and then have monthly check-ins, supported by the Office of the Provost in collaboration with PLU's Wild Hope Center for Vocation. This center supports a variety of programs for faculty, staff, and students to explore how their lives might promote "human and ecological flourishing." All faculty attend the Fall Conference which is developed by faculty in collaboration with the Office of the Provost and provides professional development opportunities centered around key themes and/or strategic priorities. As part of on-going faculty development, the Dean of Inclusive Excellence offers stand-alone workshops throughout the year as well as in-depth small group seminars focused on a wide range of inclusive teaching practices. Feedback to faculty is available through Small Group Instructional Diagnostics (SGIDs) as well as peer to peer observation and feedback via the Teaching Squares program. Chair training is also offered monthly to all

academic program leaders on just-in-time topics such as how to build a student-friendly course schedule and how to write effective faculty reviews. These opportunities are communicated to all faculty regularly through the Faculty Newsletter, produced by the Office of the Provost and distributed 3-4 times per academic term.

Student Life provides both a year-long onboarding process for new employees, as well as regularly scheduled gatherings focused on professional development topics to which all divisional staff members are invited. These all staff opportunities are supplemented by a small professional development budget that, through application and Student Life Council (supervisors) determination using a collaboratively developed rubric, allocated to support external forms of professional development and learning. The division also participates in role specific learning opportunities, such as inclusive pedagogy training in preparation for teaching the PLUS 100 general education course.

While these opportunities are present for employees, a recent Well-being survey conducted by the President's Council in the Fall of 2023 demonstrated that opportunities for growth and development were among the poorest rated well-being benefits for both faculty and staff. The President's Council is currently considering how to better understand and address this need with the limited human and fiscal resources available.

> **Evidence Summary:**
> Human Resources - Training and Development
> Wild Hope Seminars

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.*

PLU currently employs a total of 532 full-time faculty and staff. There are 186 full time faculty and an additional 114 part time faculty for a total of 300 faculty members. The current faculty to student ratio is 11.6 students per faculty FTE and the student to staff ratio is 6.8 students per staff member. These numbers reflect a reduction of 87 full time faculty and staff since the 2017-208 academic year - however, both the faculty and staff to student ratios have remained stable during this time - reflecting a "right sizing" of personnel levels as student enrollments dropped during this same period.

As with most colleges and universities across the country, PLU has had to respond to pressures placed on higher education institutions regarding changing student enrollments and demographics, employee and worker availability, lingering COVID impacts, and changing industry dynamics across most university functions. To adapt and respond to the adjustments

such changes bring - PLU has actively engaged in efforts that allow critical educational outcomes and services to be maintained and, in some cases improved, even with a smaller workforce. For example, reductions to faculty numbers over the past several years were met by the faculty with changes to the faculty governance structure - making it smaller and more efficient. A significant restructuring of the academic division was also accomplished in part to improve administrative support efficiencies across academic programs. Similar changes within student services and student life have led to the consolidation of clinical and non-clinical case management and wellbeing services into an integrated care resource focused on student wellbeing and persistence, Wellbeing Services & Resources (WSR). Within the division of Administrative Services, changes have relocated our Business Office with Student Financial Services to streamline similar processes. This allows employees to share strengths and reduce redundancies by aligning all financial employees in one location. The division also aligned Human Resources, Student Employment, and Payroll in one location. In the division of University Relations, position vacancies have brought opportunities for re-alignment of roles and responsibilities, with a most notable change being the clustering of senior fundraisers under a manager versus a fellow fundraiser as they had been in a previous structure.

While many of these changes were influenced by forces beyond our control, we were also guided by our current (2021-2025) Strategic Plan which called for us to review the scope of work and tasks across all roles and areas of responsibility to determine what work can be eliminated, achieved differently or prioritized differently. This same strategic focus guided us to intentionally invest in targeted areas that we identified as critical needs for our campus. This includes fulfilling the commitment made in our mid-cycle report to develop an office of Institutional Effectiveness. Additional strategic investments since our last year seven report include the development of an Office of Sponsored Programs, an expansion of the office of Institutional Research and Analytics, and the creation of a new position to oversee general education and assessment (Dean of Core Curriculum and Assessment).

In our effort to ensure that we are staffing the university sufficiently with respect to roles and responsibilities, all vacancies are brought to the President's Council for action (approval, denial, delayed hiring) following a budget review process. For each open position, criteria and qualifications are clearly posted on the Human Resources website. The procedures for applying for an open position are publicly posted and available to all interested parties. For example, the process for approving tenure-track positions has been significantly updated to become more collaborative, consultative, and equity-minded in focus. The pro forma was revised to capture information about current enrollments and enrollment projections, departmental and pan-university teaching commitments the position would carry, as well as the position's contributions to curricula that are equity-minded and serve underrepresented student groups. All pro forma are reviewed annually by the college deans, who advise the provost on their recommendations regarding which positions the provost should move forward to President's Council in that academic year.

Across the university our approach to recruitment and selection of qualified employees has improved as we have added consistent training rooted in our shared understanding of equity

minded practices, including implicit bias training and search milestone checks, as a part of each search. These embedded practices have led to more intentional search and hiring practices, as well as yielded applicant pools and hires that contribute diversity to our university community. In required instances, and with careful attention to the importance of roles and responsibilities, while also paying attention to the external resources that are necessary for monitoring them, we have engaged a handful of fully remote employees with great success. We have also developed a remote work policy for campus-based employees who work up to 20% of their schedule from another location. Adoption of this policy has assisted our recruitment and retention of valued employees across campus, while also contributing to their wellbeing.

> **Evidence Summary:**
> Human Resources - Employment
> Human Resources - Personnel Manual
> > Remote Work Policy
> > University Organizational Chart
> > Academic Organizational Chart and Faculty List (Roster)

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.*

The University is in the process of hiring a new Chief Operating Officer/Vice President for Administrative Services who supervises the Office of Human Resources (the previous COO retired in January 2023). An initial identified priority for that individual will be to examine the performance review process. Our system has not been reviewed and/or updated for several years. We have identified this as an opportunity for improvement of the process with the purpose of improving employee recognition, accountability, development, and retention. A wellbeing survey (results password protected) of all PLU employees was conducted by the President's Council in the Fall of 2023, the results of which were generally very positive. The survey, modeled after the Surgeon General's Framework for Workplace Mental Health and Well-being, was conducted with the intent of identifying general aspects of employee wellbeing where resource allocation and support is most in need. Results highlighted those areas related to professional development, feedback, mentoring and pathways for advancement provide the most opportunities for improvement. The President's Council is currently seeking additional input and is considering how to best approach some of these needs.

Staff and Administration

The director for human resources is given the authority and responsibility to carry out the performance review system for staff. A clear process for staff evaluation is in place. The

challenges we face center around perceived value of the reviews, inconsistency in completion of the reviews across campus, and a lack of flexibility within the structure to adequately attend to differing needs of the divisions and division leadership. Reflecting on, and clarifying, the primary intent and purpose of our own review processes is an important part of our current discernment. Moving from an evaluative, top-down model to a more engaged, sustained and goal directed model focused on professional growth and development provides one promising direction. Living into our mission for both leadership and care among our own employees is calling us to do better in this area.

Faculty

While tenure track faculty have a clear process in place for pre-tenure, tenure and post-tenure reviews, some of the same philosophical questions facing the staff evaluation process are guiding discussions that center on how the tenure and annual review processes of faculty could be better implemented and leveraged to improve faculty performance, ensure high quality pedagogy and promote faculty longevity. The same opportunities present themselves in the review of contingent faculty. This work is also complimented by periodic program review. Finally, the work of ensuring meaningful opportunities for professional growth and development across campus cannot be separated from the need to also improve leadership development opportunities - as providing effective and impactful feedback, guiding goal setting and engaging in reflection are central practices in both efforts.

President

In addition to the regular review of all faculty and staff, the President is reviewed annually by the Board of Regents according to the framework they have established.

> **Evidence Summary:**
> Supervisor Manual and Performance Appraisal Form
> Rank and Tenure Committee website
> Tenure and Promotion Review Process - Faculty Handbook (Section 2)
> Tenure and Promotion Criteria - Faculty Handbook
> Faculty Review Process - Contingent Faculty (Section 3)
> Academic Program Review Self-Study Guide
> Presidential Assessment Framework

Standard G - 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.

In previous iterations of our accreditation reports we have focused our response to this standard solely on the physical environment dedicated to learning. With teaching and learning environments shifting to include on-line and hybrid learning, and as our consciousness about attending to the broader conditions that support learning have evolved, our understanding of this standard has similarly expanded. In addition to the physical spaces described below, the university is deeply committed to creating equitable and inclusive learning environments that support all students in their learning experiences. On-going faculty development opportunities, examination of disaggregated student success data in all academic programs, incorporation of universal design principles in pedagogy, and other such efforts and impacts will be expanded on in the year seven Mission Fulfillment report in the broader context of student success.

The Physical Learning Environment

The overall campus layout can be seen in the [interactive campus map.](#) The availability of our physical learning spaces has remained relatively unchanged over time. We have worked to improve technology access and integration in classrooms and laboratories to include integrated projectors, cameras and other tools that support a wider range of pedagogical approaches and course designs. In addition, we continue to engage in periodic evaluations of our physical spaces, including a thorough ventilation analysis of all classroom and laboratory spaces conducted during the COVID-19 pandemic. We have invested in improvement over time in classroom furniture, to be responsive to both flexible teaching/learning opportunities and student accessibility and mobility needs). Our decisions are guided by principles of universal design, and how we can best engage the design of physical spaces to interact with the pedagogy, meet the divergent needs of students/learners.

In the last five years, PLU has opened a new School of Nursing building complete with simulation labs. The Rieke Science center has also been updated with new lab spaces for biology and new lecture spaces that promote student learning and group interactions. A new study space in the lobby has been equipped with improved support structures (white board tables, white boards, drop-in tutoring). The next phase of the Rieke building upgrades will be to completely update the chemistry labs. Foss Hall, a mothballed residence hall, was demolished in 2023 and the open space is part of the larger master planning process around well-being.

Renovation and modernization of buildings are consistent with PLU's interior academic environment goals of creating adjacencies and consolidating departments and groups. To meet the space needs of students, faculty, and staff, PLU utilizes a collaborative planning process involving space users and occupants, facilities management staff, architects, and senior

administrators to evaluate current and future space needs and develop a comprehensive space plan on which to frame renovation or construction planning. This process gives voice to faculty, staff, and students regarding space needs.

Additional Learning Spaces

The Capital Expenditures committee took ownership and oversight of third spaces on campus. This centralized group of campus constituents has gathered insight and feedback from the needs of campus to renovate and provide spaces between living and classroom. These spaces offer students and faculty a place for additional connection with one another. Over the last 3 years, the Rieke lobby and The Cave have been improved for students and commuter students. Residential learning communities are also an integral part of the overall focus on creating a range of campus spaces that promote academic and non-academic dialogue and learning.

Spaces for Academic Support Services

The Center for Student Success, physically located on the first floor of the library, incorporates advising, testing center, academic support, and textbooks. The grouping of responsibilities helps secure increased student knowledge of support across the university.
Academic Advising is for all incoming first year and transfer students within the Center and its partner advisors. The Partner advisor program allows for more diverse advisors and allows for increased number of advisor/student interactions and follow-up for any concerns.   In 2023, the Center's professional advisors had 3,830 appointments with individual students and offered walk-in hours multiple times per month and all-day coverage during registration periods (via advisors in lobby, Google chat and video conferencing). The Testing Center also provides centralized support both for students with accommodations and for students who need alternate testing times.

Not all academic support services are located within a physical space on campus. The use of the Knack (virtual) platform for academic tutoring services is an example of a recent change that provides greater access to all students than previous services constrained to brick and mortar locations did.

> **Evidence Summary:**
> Interactive Campus Map
> Commuter Student Lounge and Study Space (The Cave)
> Residential Learning Communities
> Center for Student Success
> Academic Advising
> Testing Center
> Knack Peer Tutoring

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.

PLU maintains an on-line Catalog as well as a PDF version available for an individual to print. Revisions to the catalog stem from approved curricular revisions that have been approved by the Faculty Assembly and Board of Regents, as appropriate. Each spring, the Registrar solicits reviews and non-substantive edits from department and program chairs to ensure the accuracy of all catalog materials. The Catalog describes institutional history and values; entrance requirements and procedures; grading policy; information on academic programs and courses, including degree and program completion requirements, expected institutional 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, 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; the academic calendar; and more.

Evidence Summary:
On-line Catalog
Integrative Learning Objectives
Admission requirements and procedures
Undergraduate Academic Policies and Procedures (rules and regulations; code of conduct; rights and responsibilities; grading; academic standing; course load)
Undergraduate Courses and Curriculum
Graduate Admissions
Graduate Policies and Procedures
Tuition, fees, and other program costs (including withdrawal and refunds)
Financial Aid Information
Academic Calendars
Faculty Roster
Graduate Tuition and Fees (web page)

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.

Program areas that lead to professional certification or licensure provide relevant information in both the university catalog as well as on department/program websites. Programs with such requirements include undergraduate and graduate education programs; undergraduate and graduate nursing programs; undergraduate and graduate Social Work (MSW beginning 2024-2025) programs and the master's degree in Marriage and Family Therapy.

> **Evidence Summary:**
> Bachelor of Science in Nursing - University Catalog
> Master of Science in Nursing - University Catalog
> Doctor of Nursing Practice   - University Catalog
> Bachelor of Arts in Education (with teacher certification) - University Catalog
> Master of Art in Education (with teacher certification) - University Catalog
> Doctor of Education with Superintendent Certification - University Catalog
> Marriage and Family Therapy - Program Website

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.*

The awarding of financial aid is an essential part of the way PLU approaches recruitment, retention, and student success. Each year, the university awards both need-based and merit-based financial aid. The financial aid awarding policy and process is rooted in the university's dedication to recognizing academic excellence and protecting student access to private higher education. Approximately 99% of PLU students receive some form of financial aid each year to pay for their total educational expenses. Merit-based aid is awarded based on academic accomplishments and perceived academic ability. Students are notified of the amount of their merit scholarship upon admission to the university. Award amounts range from $8,000 - $32,000. Students also can apply for larger merit scholarships such as the President's Scholarship, the Harstad Scholarships, and the Regents' Scholarship.

Need-based aid is awarded based on financial need as determined by the difference between a family's ability to pay (calculated by the FAFSA) and the total cost of tuition, fees, housing, food, and personal expenses for one academic year or identified term of study. Financial aid awarding policies and procedures are reviewed annually by the university's external auditing firm as well as state and federal authorities. The average financial aid offer is approximately $45,000, which includes loans and work-study. The average debt of graduating students is approximately $30,000.

Prospective and current PLU students are informed of both merit-based and need-based financial aid programs via print and electronic information sources. Prospective students are regularly informed of need-based and merit-based financial aid programs via the Office of Admission. Similar information is provided to prospective transfers, international, and graduate students. Additionally, prospective students are notified of their eligibility for merit-based scholarships at the time of admission. Information regarding eligibility for need-based financial aid is provided upon receipt of the FAFSA data.

Continuing PLU students are notified of both merit and need based financial aid on a regular schedule. Multiple communications are sent to students alerting them of upcoming financial aid deadlines and required paperwork, as well as opportunities to apply for additional forms of financial aid.

> **Evidence Summary:**
> Financial Aid Policies and Procedures

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.*

The university closely monitors all student loan programs via regular analysis and documentation of funds awarded, as well as funds refunded to various lenders including the Federal Direct Student Loan Program and a select group of preferred alternative loan providers. Policies and practices regarding the handling of Title IV federal financial aid are audited each year. Loan default rates and other consumer information is made publicly available.
All recipients of loans are required to complete both entrance and exit counseling delivered via online tutorials. It is during these tutorials and information sessions that students are officially informed of their loan obligations, repayment requirements, and terms of their loans. Furthermore, the State of Washington now requires all institutions to notify students of their most up-to-date loan obligations any time a new loan is offered during their enrollment. Financial Aid information is maintained on the Office of Financial Services website.

> **Evidence Summary:**
> Financial Aid Policies and Procedures
> Loan Default Rate(s)
> Information about categories of financial assistance
> Recent graduate information

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.*

The Academic Advising Office is embedded within the Center for Student Success to provide holistic support to students, faculty and staff. It conducts training sessions for faculty and professional advisors. Each year, prior to the beginning of the fall term, training is offered for new advisors, which also serves as a refresher for experienced advisors. The focus is on advising tools and processes: CAPP (curriculum, advising, and program planning) report, which monitors students' progress in completing the above requirements; registration/advising manual (updated annually); PLU advising system; registration, and major and minor declaration: "My Academic Pathways"; course cycles; and four-year advising guides.

Academic Advising staff members coordinate and implement the New Student Registration (NSR) program for new first-year students. Each summer new first-year students are registered for their first term with one-on-one meetings with a professional advisor. Prior to their arrival for NSR, students receive an individualized Advising Session Guide which introduces them to General Education requirements and contains a set schedule that starts them toward their major and general education elements. It also includes information on their potential major and an outline of a 4-year plan. Their CAPP report further explains their General Education requirements and monitors their progress toward completing these requirements. Periodic training sessions on various topics are offered in the fall and spring semesters to faculty and staff. The professional advisors in Academic Advising are available to answer questions from faculty throughout the year.

Academic Advising maintains a website which targets both advisors and students and provides a variety of forms which are useful in the advising process. Advisors and students make active use of the CAPP report which now monitors not only progress in completing General Education requirements and major/minor requirements. Academic advising notes, standing, contact information and other important student information are centralized in the Banner Student Profile that all faculty can access.

Students may change their advisor at any time. Students declaring a second major will have two faculty advisors listed in the Banner system, one advisor for each major. Advising requirements and responsibilities for advisors and students are clearly defined and are available on the Academic Advising website and in the Faculty Handbook.

Evidence Summary:
Center for Student Success
Academic Advising

Standard 2.G.7

> *The institution maintains an effective identity verification process for students, including those 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.*

While PLU is authorized to provide distance education, this was primarily pursued during the height of the Covid-19 pandemic as an essential transition. We currently offer no fully on-line academic degree programs and students attend varying amounts of in person classroom or laboratory-based experiences in all undergraduate and graduate programs. Except for the ABSN degree, all undergraduate degree programs only leverage the learning management system (Sakai) as a means of augmenting and supporting student learning. While a select few classes may be delivered on-line during the January or Summer terms, they include synchronous face to face interactions and are generally part of degree programs where students are known by faculty, staff, and each other. As a result, faculty can verify student identity in a manner similar to what in person learning provides.

All university business is conducted via single sign-on (SSO) access. Official E-pass accounts provide students, faculty and staff access to all tools and resources including the LMS, library services, email communications, registration and academic records, financial services, and room and board. The university uses dual factor authentication for all log in activities, including access to Sakai (LMS system). Within the LMS student rosters include official photos of all students such that photo rosters can be accessed, printed and utilized at any point by faculty. [The Accelerated Bachelor of Science in Nursing (ABSN) program](#), the university program with the highest overall distance education element, utilizes a variety of approaches relative to identity verification. These include background checks that include verification by photo identification; single server log in using official university username/password for Canvas access (using Security Assertion Markup Language - SAML); on site testing and in person skill laboratories for all courses except NURS 498 which adheres to the [School of Nursing Testing Policy](#), [Pre Licensure Exam Policies](#) and [ATI proctoring processes](#).

In addition to following [FERPA requirements](#), a variety of [additional privacy policies](#) exist to ensure the privacy of students and faculty.

> **Evidence Summary:**
> [School of Nursing Exam Policy](#) - School of Nursing Student Handbook
> [FERPA policy](#)

Standard H - 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 Robert A.L. Mortvedt Library is committed to enabling, empowering, and encouraging life-long learning. The library provides access to information resources that support teaching of critical thinking and pursuit of knowledge within the Pacific Lutheran University Community in order to advance PLU's mission of providing quality education in preparation for lives of service.

Personnel
The library staff consists of ten people, six of whom have master's degrees in library science (with two currently enrolled in programs). Two tenure-track librarians handle the bulk of library instruction requests, with core library services and duties (reference, acquisitions, cataloging, circulation, e-resources, etc.) distributed among the staff at large. There is job overlap and sharing among the staff, as is necessary in a small academic library. Plans to fill vacancies are in the works.

Access to Information
Library faculty further information access by collaborating with instructors to meet the research needs of students through library instruction and reference consultations. Instruction sessions permit library faculty to collaborate with course instructors to develop lessons that address immediate information needs of students as well as teach them skills that transfer to other learning contexts. This collaboration allows faculty and librarians to establish a common ground from which each can meet their educational outcomes. Reference consultations, where a librarian and a student address in-depth questions, assist students in learning to meet their specific research needs in ways fruitful for them. To enhance the effectiveness of these activities, library faculty have developed research resources for students to use and teaching resources that faculty may implement in their classrooms.

The library maintains a physical collection of over 250,000 books and manuscripts; 9,000 media; and 25,000 serial publications, among other items. It also provides access to over 400,000 electronic books and to 135 information databases, the latter of which connect users to millions

of journal articles. Decisions to add or subtract items from Mortvedt Library are guided by the [library collection development policy](#), with staff members doing their best to anticipate information needs based on course offerings and faculty research. To assess collection relevancy, librarians identify core subject information resources at peer institutions and match results to PLU holdings; they also examine usage database statistics to determine efficacy of the resources. For items not collected by the library, PLU offers its affiliates a robust [inter-library loan service](#) (ILL) in which library users create accounts to submit, track, and retrieve ILL requests. Scores of local, regional, and global borrowing agreements among libraries coalesce to form the infrastructure powering this service.

Mortvedt Library also maintains the [University Archives and Special Collections](#), which house the University Archives, Scandinavian Immigrant Experience Collection, Nisqually Plains Collection, and the Evangelical Lutheran Church in America (ELCA) Region 1 Archives. PLU Archives is an active partner with faculty and students in several academic areas, especially Religion, Publishing and Printing, and Nordic Studies. In addition, the offices of Marketing and Communications, President, and Alumni Relations rely heavily on the information about the university that is stored and made accessible by the Archives. As expected, PLU Archives digitizes much of its holdings and creates and hosts physical and virtual exhibits regularly, opening their collections to the world.

The Mortvedt Library building is a de facto learning common, home to Academic Assistance, the Writing Center, the Center for Student Success, Information & Technology Services (I&TS), as well as the library. An academic commons rests on the notion that students come to a library primarily to get work done, and offering services like reference assistance, tutoring, or IT consultation to students while studying allows campus professionals to meet students at authentic points of need when completing assignments. The building has 30 study rooms, 70 computers, and a variety of study spaces that support collaborative and private study. Several study rooms have computers equipped with software that assists those visually and/or aurally impaired; these rooms also are designated sites for telemedical appointments. The library reviews its database licenses with respect to ADA compliance, ensuring that databases have screen readers, translation software, text-to-speech options, audio to MP3 file downloading, closed captioning, interactive transcripts, and other measures that aid those in need.

Evidence Summary:
[PLU Library](#)
[Collection Development Policy](#)
[Library Instruction Policy](#)

Standard I - Physical and Technology 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.*

Facilities Planning and Oversight

The university prepared a [facilities master plan](#), with the most recent plan adopted in 2014. As part of the process for developing the master plan, each department meets with planning consultants to assess departmental needs, and priorities are aggregated in the final plan. Additionally, there is an approved [Major Institutional Master Plan (PUD 1-10)](#) that is approved by Pierce County with the main plan approved in 2016, and the latest update in 2023. PLU is also working on a Health and Wellness master plan to focus on current priorities over the next 5-10 years. Renovation and modernization of buildings are consistent with PLU's interior academic environment goals of creating adjacencies and consolidating departments and groups. Floor plans for all university buildings are available as a planning resource (pass protected and available upon request).

Additionally, PLU evaluates equipment needs annually, with departments requesting new and replacement equipment through the annual budgeting process and completing an equipment request form to highlight critical equipment outside of a department's budget. Requests are made by program leaders and prioritized by Deans and Vice Presidents, and available funding is dedicated to priority equipment requests.

Classrooms and Laboratories

According to the 2012 space utilization analysis, most general classroom needs are met by the current inventory. The condition and technology of classrooms continues to improve with minor renovations and technology upgrades. In the 2014 Campus Master Plan, it was identified that future classroom space will also involve development of specific standards for small, medium, and large classroom layouts that promote active learning. Multiple classrooms have been outfitted with upgraded lighting with dimming capability, new furniture and accessibility improvements. In 2022, laboratories in several buildings received significant upgrades to meet the changing needs of science and to better equip our faculty and students with the latest technology.   A major fundraising effort is underway for a major upgrade to the large open lab (physics and chemistry) in the Rieke science center.

Hazardous Materials

A full-time Environmental, Health, and Safety (EHS) Director oversees hazardous waste management operations at PLU and manages compliance with government regulations. EHS's main objective is to protect PLU's most important assets: students, faculty, staff, and visitors through the implementation and training of workplace safety/health/environmental policies

and procedures. PLU's EHS Manager is responsible for synchronizing ideas and standards, interfacing with divisional departments, and implementing major components relating to environmental stewardship, industrial hygiene, and occupational safety programs to minimize hazards and meet compliance requirements. The PLU Hazardous Waste Management Plan prioritizes waste management activities in the following order: minimization, recovery, treatment-by-generator, and commercial disposal. It details the safe and legal on-site handling of hazardous waste.

Information and Technology Services
[The Information and Technology Services](#) department provides direct support for a wide range of infrastructure and technologies - from network and communications infrastructures to cyber security and instructional support. Service areas attended to by I&TS include critical functions such as:

- Accounts and passwords
- Email, calendar, and Google Workspace
- Network, wireless, phones, and cable TV
- Classrooms, computing labs, and learning technologies
- Computers and software; support, updates, purchasing
- Security, anti-virus, and data backups
- Information systems; deployment, integration, reporting
- Training and workshops
- Web development and integration
- Campus technology infrastructure; servers, fiber, data centers
- Cyber threat monitoring
- Event technology support
- Audio, visual, video production and streaming
- Document imaging, storage, and retrieval
- Help desk services

Access and Security
I&TS has continued the development of a modern Identity & Access Management architecture. Use of multi-factor authentication (MFA) is in place to enhance user authentication protections for critical resources as well as a leading-edge password expiration and complexity architecture that uses a risk-based approach to assess criteria. Cybersecurity risk assessments are conducted annually in partnership with DeepSeas (formerly GreyCastle Security). The results of these assessments result in a set of identified priorities for mitigating risks and meeting compliance with industry standards. These findings are shared annually with the Executive Cabinet. Deep Seas additionally provides vCISO services to PLU (virtual chief information security officer). Managed SOC (security operations center) services are provided by ArmorPoint, which monitors PLU's IT environment 24/7 for security threats.

Most resources, systems, and applications are accessible via the web. Some services such as Google Workspace, Slate, and the Sakai Learning Management System have mobile interfaces for access across a variety of devices. PLU has also developed mobile applications including the award-winning Marty app, Guidebook, PLU Knight Shield, and the Ellucian Banner mobile app to allow for course registration, checking grades, and more.

Access to some services require Virtual Private Network (VPN) accounts, special account credentials, or specific network connectivity. Such accounts and access privileges are distributed selectively for those employees requiring access to these resources.

Information about all privacy and security policies and procedures is available at the I&TS Data Classification, Access Control, & Security Policies webpage.

Teaching and Learning Supports
Technology support for teaching and learning are available to all faculty, staff and students through Instructional Technologies (ITech). The ITech department oversees a wide array of products and services that include consultation related to items such as effective use of the LMS, classroom technologies and Google Workspace to support services like managing cloud storage and being trained on specialized equipment use. Support for campus activities and events that require technology integration are also supported by Instructional Technologies. A twenty-four hour a day help desk (virtual) is complemented by a physical help desk in the library which are both easily accessible through an on-line ticketing system. Finally, an on-going professional development program is in place to provide students, faculty and staff with timely education and training on a host of technology related topics.

> **Evidence Summary:**
> Instructional Technology webpage
> > Instructional Technologies
> > Classroom Technologies
> > Event Support
> > Professional Development
> > Cybersecurity
> > Help Desk
>
> I&TS Data Classification, Access Control, & Security Policies
> > Definitions, Roles, & Responsibilities
> > Network Access and Security
> > General Network and Data Security Practices
> > Data Classification and Control
> > Outsourcing and External Party Access
> > Mobile Devices and Remote Storage
> > Incident Management and Response

Part 4: Moving Forward

The timing of our year seven Mission Fulfillment report will align with the natural evolution of several key projects. The current PLU Strategic Plan is set to expire at the end of the 2024-2025 academic year. As such, we will be working on new strategic and guiding documents at the same time as we complete our Mission Fulfillment report and visit in the Spring of 2025. This combined reflection and planning process will allow us to consider both the how and what of our strategic planning activities, and to use the mission fulfillment process as a way of identifying opportunities for improvement and for continued success. Several key areas of focus have already emerged. These include:

- Strategic Partnerships (strategic priority): On February 6, 2024 the university announced the Partnership for Health Innovation. Identifying future action items, nurturing, and growing the partnership and integrating collective vision into future strategic initiatives and documents will be essential.
- Resource Stewardship (strategic priority): As we submit this report, we are also in the process of hiring and on-boarding a new Chief Operating Officer. This role has been reconfigured to better position and align institutional capacity in human resources, facilities, and finance to complement what is required to realize the full expectation of our strategic priorities.
- Leadership and Care (mission and core theme): Demonstrating our commitment to both care and leadership, as exemplified in both the mission of the university and in our core themes, will continue to be an integrated focus in a variety of initiatives. Fostering and supporting well-being in ways that support both the PLU and surrounding communities will remain at the core of these efforts. Select activities in this area include:
  - Clarifying and strategizing future wellbeing infrastructure needs and fundraising initiatives.
  - Carefully analyzing and considering how to best support both student and faculty/staff growth and development in a host of areas related to our missional element of leadership. This includes charging the newly hired COO with the responsibility of improving the staff evaluation process and its impact.
  - Continuing to evaluate and implement changes to the daily schedule, and work week, so that both can better support the wellbeing of students, faculty and staff.
  - Continue a collaborative budgeting process that centers wellbeing by ensuring a living wage for all employees and moving toward improved salaries for all employees.
- Data Informed Decision Making: Continue to improve and expand our ability to leverage data and information, including both disaggregated and peer data, to identify and close equity gaps in student access (recruitment) and student success (retention and graduation).

Part 5: Addendums

Pacific Lutheran University has no outstanding recommendations from the Year Three Mid Cycle Report.