

REPORT OF THE WSCUC VISITING TEAM REMOTE SPECIAL VISIT

Western University of Health Sciences
April 7-9, 2021

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The team evaluated the institution under the 2013 Standards of Accreditation and prepared this report containing its collective evaluation for consideration and action by the institution and by the WASC Senior College and University Commission (WSCUC).

The formal action concerning the institution's status is taken by the Commission and is described in a letter from the Commission to the institution. This report and the Commission letter are made available to the public by publication on the WSCUC website.

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SECTION I – OVERVIEW AND CONTEXT

A. Description of Institution, Accreditation History, as relevant, and Visit

Western University for Health Sciences (WesternU) is a private, non-profit university, educating a workforce dedicated to the health of individuals and communities. The university has a main campus in Pomona, California and a branch campus in Lebanon, Oregon. Founded in Pomona as a school of osteopathic medicine in 1977, WesternU has grown to include nine graduate colleges, offering degrees in 14 health professions and health science disciplines, as well as two nurse practitioner certificates. Student enrollment has declined slightly from 3,848 in fall 2017 to 3,792 in fall 2019. The Lebanon, Oregon branch campus currently offers a single program that leads to a Doctor of Osteopathic Medicine degree. According to the Special Visit Report, The Lebanon campus, formerly known as COMP-Northwest, was recently rebranded as WesternU-Oregon in anticipation of the opening of the Doctor of Physical Therapy (DPT) program (DPT-Oregon) in 2021 (to go along with the Doctor of Osteopathic Medicine).

The mission of WesternU is, “To produce, in a humanistic tradition, health care professionals and biomedical knowledge that will enhance and extend the quality of life in our communities.” President Wilson has articulated an ambitious vision for the campus which is consistent with this mission and is based upon five pillars which guide the university’s strategic actions. Those pillars are: 1) interprofessionalism 2) collaboration and partnerships, 3) revenue diversity, 4) innovation and operational excellence, and 5) educational excellence and online learning.

WesternU was granted candidacy by the WASC Senior College and University Commission (WSCUC) in 1990 and received initial accreditation in 1996. Since that time, WesternU accreditation has been reaffirmed three times, most recently in 2018. In reaffirming the accreditation of WesternU in 2010, the Commission called for a Special Visit in spring 2013, which was followed by a second Special Visit in 2014. After the 2018 Accreditation Visit, the Commission requested a special visit in Spring 2021 to address and update information related to the Board of Trustees, and Diversity of the Board as well as WesternU’s alignment with the WSCUC Equity and Inclusion Policy. Following a chain of events in late 2020 into early 2021, in which the University’s Academic Assembly voted no confidence in the President, the Provost, and the Senior Vice President for Research, shared governance was added to the focus of the special visit. The institution then submitted an addendum to its Institutional Report that addressed the shared governance issues. Thus, the spring 2021 special visit reviewed the following issues:

1. Board of Trustees CFR 3.9: *The board takes its fiduciary role seriously and has successfully conducted a search process for the new president. The Board should continue to expand its capacity and effectiveness to provide appropriate oversight of institutional integrity, policies, and ongoing operations. It should seek members with diverse qualifications and experiences to help govern an institution of higher learning and meet the mission of WUHS to its communities.*

2. Diversity CFR 1.4, 2.10: *The Board, administration, faculty, and staff should devote meaningful resources to create a diverse and inclusive learning environment at both campuses and among WUHS clinical preceptors. The Board should continue to expand in a number of areas including attention to diversity of Board members. WUHS will be served by alignment with the WSCUC Equity and Inclusion Policy.*

3. Shared Governance CFR 4.2, 3.4, 2.7: *WesternU has initiated significant steps to engage the creativity and insights of faculty to improve the quality of education and research. The Board, administration, faculty, and staff continue to strengthen shared governance initiatives, implement them throughout the university, and enhance bidirectional communication between all levels of WUHS so that front-line faculty and staff are fully engaged and have psychological safety to help improve the educational environment and innovate.*

B. Description of Team's Review Process

The team reviewed the Institutional Special Visit Report as well as the Special Visit Report Addendum addressing Shared Governance in preparation for the Virtual Special Visit which occurred on April 7 and 8, 2021. In preparation for the visit, the team, guided by the WSCUC liaison and the team chair, exchanged e-mail communication prior to the team conference call (March 18, 2021), and identified the reviewers for each of the three lines of inquiry that were aligned with team member's expertise. The team worksheet guided the conversation and team strategies for the gathering and analysis of evidence for those issues. A detailed list of questions was developed during the conference call, identifying further documents needed for the visit. The team further finalized and verified questions for the visit on the morning of April 7th, just prior to the start of the visit.

During the visit, the team met remotely, via Zoom, with members of the university community on both the Pomona and Lebanon campuses. The team had meetings with the President, senior executive staff, members of the Board, the Provost, the Academic Deans, the Academic Senate, open staff meeting, open faculty meeting, the Humanism Equity Anti-Racism Team (H.E.A.R.T.) staff, Shared Governance Task Force, Staff Council Formation Committee, University Research Committee, open meeting with students from both campuses, University Faculty Affairs Committee, and the White Coats for Black Lives student action group. In addition, the president and vice president of the Academic Senate requested a private meeting with the team which the team's chair, another team member, and the WSCUC Liaison attended. In addition, the team took note of comments that were added to the "chat" during the Zoom meetings as well as numerous and detailed comments sent to the confidential email account.

C. Institution's Special Report: Quality and Rigor of the Report and Supporting Evidence

The WesternU Special Visit Report offered a candid, clear update on the institution's progress since 2018 on the two issues requested for the SV by the WSCUC Commission. The document provided information on the impact of the COVID 19 pandemic to the academic, clinical and operational activities. The report included appendices to a variety of documents that were

relevant to changes and plans for change with respect to the issues Board of Trustees and Diversity. Overall, the Special Visit Report provided a thorough and honest assessment of their progress.

The university also provided an addendum to the institutional report specifically to provide an update on shared governance. The addendum added useful contextual information on steps taken by the Board of Trustees and President in the Summer and Fall of 2020 surrounding shared governance. However, it did not adequately describe the reasons for the No Confidence vote as articulated by the Academic Senate/Assembly. The team asked for a number of documents pertaining to the no-confidence votes, such as Minutes of the Academic Senate and the Faculty Assembly (FA) and the Faculty Handbook and they were promptly provided by the ALO, along with a number of documents related to shared governance and decision making at WesternU. These documents allowed the visiting team to develop a better understanding of the shared governance issues. Moreover, administrators and faculty were open and candid with the Visiting Team during meetings in discussing their views on shared governance.

SECTION II – EVALUATION OF ISSUES UNDER THE STANDARDS

A. Board of Trustees CFR 3.9

The 2018 WSCUC review under this standard concluded with the following recommendation: The board takes its fiduciary role seriously and has successfully conducted a search process for the new president. *The Board should continue to expand its capacity and effectiveness to provide appropriate oversight of institutional integrity, policies, and ongoing operations. It should seek members with diverse qualifications and experiences to help govern an institution of higher learning and meet the mission of WesternU to its communities. (CFR 3.9)*

This recommendation was made in the context of the transition in Presidential leadership in 2016 from the long-serving founding President, Dr. Philip Pumerantz, to Western University's second President, Dr. Daniel Wilson. During the special visit current Board Trustees and senior administrators characterized the Board under Dr. Pumerantz as akin to those seen in start-up organizations. It was a small Board, averaging about 8 members, and it worked closely with Dr. Pumerantz to help build WesternU as an organization. The Board membership had excellent financial expertise and was reported as providing strong oversight in this area, but generally had less experience in academic affairs. The Board's governance was relatively unstructured. It did not keep a regular schedule of meetings, nor did it have developed bylaws in key areas such as committee charters, responsibilities of members, or conflict of interest policy.

Dr. Wilson stated that, upon his appointment as president, he made the Board a key priority. His efforts to expand and modernize the Board were only beginning during the 2018 WSCUC reaffirmation visit. Since then, Dr. Wilson initiated an expansion of the Board to include three new trustees and the board started the process of updating its activities and governance. Within this context, a purpose of the 2021 Special Visit was to evaluate progress in meeting

these goals since 2018. Given Dr. Wilson's announcement that he would retire on July 1, 2021, understanding the activities of the Board took additional relevance, since the Board would be responsible for the Presidential search.

As part of the Special Visit the team was given detailed information about the activities of the Board in recent years. This included recently adopted governance documents, including new bylaws for the Board and its committees, agendas and minutes from recent Board and Academic Affairs Committee meetings, samples of performance dashboards provided to the Board from the WesternU administration, and document pertaining to the Presidential Search and efforts by the Board to help WesternU develop a new framework for shared governance. During the visit the team was able to speak with all current trustees at a joint meeting and also spoke with select trustees as part of meetings with the Presidential Search Committee, WSCUC Special Visit Taskforce, and the Shared Governance Taskforce.

The visiting team noted progress in several areas. During 2019 and 2020 the Board membership had expanded to 12 members. Its diversity and expertise also increased. The Board now has several members with health science expertise, including two WesternU alumni. The Current Board Chair, Dr. Elizabeth Zamora, has experience in healthcare and is currently the Executive Director of an advocacy organization in Pomona focused on helping low income, first generation students gain access to and succeed in higher education. She brings important leadership experience to the Board, especially in the area of diversity and inclusion. The Board has also appointed a federal judge from the US Court of Appeals, Judge Consuelo Callahan. Her appointment brings strong legal expertise to the Board. As Chair of the Governance Committee she has overseen much of the effort to update the Board's by-laws, committee charters, and other governance documents.

The Board has worked with consultants from the Association of Governing Boards to provide Trustees education and guidance as it strengthened governance. This led to the Board's approving a series of new bylaws and related governance documents over the past three years. This includes general bylaws for the Board, documents describing the duties of Board members, a conflict-of-interest policy, and a term limit policy for Trustees. The Board also decided to move towards a stronger committee system. It updated charters for all of the Board committees. The Board is moving towards a system in which most routine work is performed at the committee level and then approved by the formal Board through consent agendas, allowing the general Board meetings to be used for more strategic discussions and approvals. Minutes of recent general Board meetings show that during 2019 and 2020 the new committee has become effective. For example, a consent agenda is now routinely used at general meetings to rapidly move through issues discussed and voted upon during committee meetings.

While the Board has taken steps to strengthen its membership and develop new governance rules, the visiting team was interested in exploring how these actions have impacted the actual work of the Board. There were signs that the independence and strategic capacity of the Board are improving. The Board has increased its level of interaction with administrators, faculty, staff and students within the WesternU community, helping to increase its level of institutional

knowledge. This increased interaction has in part been caused by the impending Presidential Transition and the Board's involvement in the Shared Governance Taskforce. However, the Board has taken steps to strengthen its interactions with the community in previous years through calling more frequent meetings and, pre-Covid, holding occasional meetings at the Oregon campus.

The Board appeared to have taken clear ownership of the ongoing Presidential transition and search. Board Chair Zamora is leading the Presidential Search Committee, with participation from other Trustees, a representative from the Academic Senate, and the senior administration. Although the Presidential Search Committee is working with an experienced search firm, it has surveyed stakeholders across WesternU to develop a detailed profile of key characteristics of a new President. Board members spoke confidently about the presidential search and had developed contingency plans should the need to develop an interim president arise. Overall, the team felt that ownership of the Presidential search was a strong example of the increased capability and confidence of the Board.

A second example of increased Board strength was in its use of data. In the past year the Board has increasingly asked the administration for data-oriented dashboards to help drive decision-making. The Board's minutes in several entries reflected the importance of data driven decisions. The visiting team was also provided access to dashboards of the performance of individual colleges that were had been prepared for the Board meetings. The team found these dashboards to be impressive, summarizing a variety of financial, admissions, and student success indicators at the college level. WesternU was commended during the 2018 WSCUC visit for its strength in institutional research. The Board appears to be drawing on this capacity to help make data-informed decisions.

The Board had also taken ownership of the process of recruiting new Trustees. Although the University's President often had a strong role in this process, the Board's leadership spoke at length about its near-term goals for expanding the Board to about 15 members, and how it goes about the process of identifying, vetting, and recruiting potential new Trustees. Taking a strong role in the recruitment of new Trustees is an important indicator of the general independence of the Board.

The visiting team found that the Board had made significant progress but that there were also areas where continued improvement was needed. In many cases, recent trends, which were encouraging, need to be continued so that they can become institutionalized. The visiting team has identified four areas where progress should be monitored.

1. *Size of the Board.* At the time of the spring 2021 special visit, the Board had only had 9 members. The team was told that this resulted in part by the new term-limits rule, which necessitated that three long-standing board members rotate off in December 2020. In interviews it was clear that the Board recognized the need for more members to operate effectively. Board Chair Zamora said that the near-term goal of the Board was to have between 12 and 15 members, and that an active process of recruiting new board members

was in place. Nevertheless, expanding the size of the board is important, especially as the term limit rule may require other long-term Trustees to rotate off in coming years.

2. *Diversity and expertise of the Board.* Although important progress had been made in this area, continuing to improve the diversity of membership and their areas of expertise should remain an important goal. Several administrators and faculty noted during meetings that Dr. David Savada, a long serving Trustee with extensive expertise in academic governance and biomedical research, had recently rotated off the Board. This left the current Board with limited expertise in academic affairs, and little if any knowledge of faculty driven biomedical research., a primary area of grant-funded laboratory research at the university. Given that WesternU has placed increased emphasis on faculty research and that policies governing research are a key driver of the shared governance discussion, it is important that the Board develop additional expertise in this area, as well as faculty affairs more generally.
3. *Governance.* The Board has made significant strides in updating its bylaws and governance documents. However, the Board needs to continue to invest energy in governance to ensure that the practices of the Board mirror the expectations of the new bylaws. Of particular importance is the Academic Affairs Committee. While minutes for some of the 2020 minutes suggest that substantive discussions took place across a number of items, board minutes provided to the team suggested that the committee only met once in 2019). Given the centrality of academic affairs to the mission of WesternU, strengthening its governance and activities should be of central importance as the Board continues to develop.
4. *Demarcation of responsibilities of the Board versus those of the administration and faculty.* Over the past six months the Board has become involved in the debate between administration and faculty over shared governance (see section 3 below). The Board has formed a taskforce, chaired by Vice Chair Judge Callahan, to help develop principles of shared governance within WesternU. The visiting team did not seek to evaluate whether this action by the Board is appropriate; given the ongoing conflict over shared governance and the impending presidential transition, it might be. However, the involvement of the Board in the shared governance was mentioned frequently by administrators and faculty leaders and it appeared to be a divisive issue within the community.

Another example of the need to better identify the appropriate roles of the Board concerned the Board's actions after the Votes of No Confidence by the Academic Assembly. It apparently was the Board that asked President Wilson to investigate the votes of No Confidence against the Provost and Senior vice President of Research. The President appointed an external evaluator to investigate, but this external evaluator was unable to complete the investigation because of illness. Faculty and staff with whom the visiting team spoke with voiced an expectation that the results of this and any other evaluations would be communicated to the campus. However, there was confusion as to whether the President or Board owned this process, and it was unclear where the responsibility to address this situation lies. The Board should work with the administration to create clear

boundaries of its responsibilities versus those of the administration. This will help set clear expectations for future activities of the Board.

B. Diversity CFR 1.4, 2.10

The Board, administration, faculty, and staff should devote meaningful resources to create a diverse and inclusive learning environment at both campuses and among WUHS clinical preceptors. The Board should continue to expand in a number of areas including attention to diversity of Board members. WUHS will be served by alignment with the WSCUC Equity and Inclusion Policy.

In Spring of 2018 and based upon some preliminary results of focus group surveys conducted by the Office of Institutional Research and Effectiveness a task force was formed to “devise a strategy for addressing the role of humanism, diversity and inclusion” for both workforce development and humanistic education at WesternU. The Inclusion and Humanism Task Force was charged by the Provost at the time (Provost Gary Gugelchuk) with “crafting a blueprint for engaging a cross-campus dialogue” to include student, faculty, staff and patient input. Among some leading questions that this task force was charged with investigating included a number of questions related to definitions of humanism, inclusion, and diversity, the relationship of the university’s mission and its commitment to diversity, inclusion and humanism and how the curriculum portrays diversity to ensure culturally-aware health care and education. Student focus groups conducted by the Office of Institutional Research and Effectiveness also suggested that aspects of diversity and inclusion warranted further attention. Indeed, these concerns were also echoed by the WSCUC commission report in July 2018 who identified institutional diversity as one of its recommendations to be reviewed during the 2021 special visit.

The Inclusion and Humanism Task Force spent close to two years collecting, analyzing and discussing evidence at meetings that were held about every six weeks. Key findings and recommendations from the Task Force were provided to Provost Baron in February of 2020. In general, the task force came to the conclusion that humanism and diversity are mutually enforcing principles and that an exploration of diversity and inclusion that does not consider WesternU’s humanistic mission would probably be incomplete. The concept of humanism was a driver of many of the conversations the site visit team had with task force members that it met with. For example, there was an acknowledgment during the meeting with the Inclusion and Humanism Task force that “humanism was used for a long time to avoid the word diversity” however, this task force has worked very hard on how to pull together the traditions of humanism with notions of diversity and inclusion in a syncretic way. The Task Force’s report suggested that while the connection between humanism, diversity and inclusion is more implicit than explicit and noted that there were few explicit humanism, diversity, equity and inclusion (HDEI) objectives that had been operationalized. While diversity and inclusion is mentioned in all professional accreditation handbooks associated with WesternU’s programs, the visiting team recommends that objectives related to diversity and inclusion should be operationalized.

The need to operationalize diversity and inclusion was also revealed in a comprehensive inclusion and humanism survey that was conducted by the Task Force with questions developed using WSCUC Equity and Inclusion Policy. Respondents in non-dominant racial, gender, sexual orientation and disability status groups, on average, reported themselves to feel less supported, less included and treated less fairly in comparison to responses to those students in dominant groups. In addition, on-time graduation rates for African American students were lower than other groups, an outcome that was also noted as part of the 2018 WSCUC reaffirmation process.

Overall, the 2020 Inclusion and Humanism Task Force report identified ten areas that needed further attention and most of these were related to needing more focused efforts on diversity and inclusion throughout the institution. They also made several recommendations related to creating a more direct link between humanism, diversity and inclusion and to develop institutional and data informed guidelines for incorporating diversity and inclusion in all programs that is reinforced and recognized.

As a result of the key findings and recommendations of the Task Force, a standing Humanism Strategic Performance Group. (H-SPG) was created by President Wilson in May 2020 to further develop and prioritize the ten Humanism Task force recommendations. Coincidentally and not surprisingly, these issues became even more urgent at WesternU with the murders of George Floyd, Breonna Taylor, Ahmaud Arbery (and others) and the ensuing demonstrations against racial injustices and the expansion of the Black Lives Matter movement. These outside forces elicited action from WesternU leaders to develop opportunities for multiple stakeholders to share feelings and perspectives in a safe place and the university engaged an experienced diversity, equity and inclusion facilitator to hold separate town halls. These events added to and bolstered the work of the H-SPG and sparked a broader response within the WesternU community.

The visiting team met with the H-SPG team leaders who overlap somewhat with those who were part of the Humanism Task Force. This group noted that they are “making an impact” particularly by virtue of at least 60 members involved in the H-SPG, representing all facets of the university. H-SPG has a number of broad goals and objectives that included operationalizing the definition of humanism as a foundation for equity, inclusion, opportunity and diversity and that those values subsume equity, inclusion, diversity. While there was a clear reluctance to operationalize humanism in terms of diversity, inclusion and equity, the group argued that diversity, equity and inclusion is at the heart of humanism. Moreover, the most recent work of the H-SPG seems to be consistent with the WSCUC Equity and Inclusion Policy.

It was clear to the team that the H-SPG leaders felt that they are “creating a culture” that is not coming from top down. They are taking note of and taking action on what is said by students, staff and faculty. They stressed their work is not one person’s job but everyone coming together to create institutional commitment momentum and sustainability. The students, and in particular, those involved in the White Coats for Black Lives (WC4BL) articulated that they will

continue to hold the administration accountable. Finally, the most recent quarterly report for the H-SPG posted on WesternU's website articulates four important goals and objectives to: 1) Operationalize our definition of Humanism and the WesternU Way as foundations for equity, inclusion, opportunity, diversity, fairness, justice and affinity; 2) Provide an institutional forum to conceptualize strategies that cultivate an environment of Humanism, equity, inclusion, and diversity; 3) Help ensure that humanistic values that subsume equity, inclusion, opportunity, diversity, fairness, justice, and affinity are integrated in WesternU curricula, student and employee recruitment strategies, university support services, patient care delivery, and other key University activities; and 4) Recommend criteria of institutional progress, including the identity and made to monitor key performance indicators. Each goal has articulated a clear charge and plan of action.

The plan to achieve these four goals and objectives included six different focus area groups:

- 1) Clinical services whose charge is to help ensure that humanistic values are integrated in patient care delivery.
- 2) Curriculum/Co-Curriculum with a charge of ensure that humanistic values are integrated in WesternU curriculum & co-curriculum. Importantly, this curriculum will embed the values of racial equality, racial inclusion, cognitive and experiential diversity that intentionally prepares competent students to provide care across all healthcare systems for vulnerable populations and health disparate groups.
- 3) Define and Measure with the intention of establishing a clear and comprehensive definition of what Humanism means at WesternU, and establish benchmarks and infrastructure for assessment and continuous improvement.
- 4) Recruitment/ Admissions/Hiring whose mission is the Recruitment, Admission and Hiring Committee (RAH) is to promote diversity, equity and inclusion through recruitment, admission and hiring practices.
- 5) University Life/Support Services to deepen the relationship between the University and its constituents, with support services, experiences, and opportunities that provide a diverse and inclusive atmosphere, where differences are celebrated, racial justice is prioritized, accountability is required, and compassion is valued
- 6) Humanism, Equity, Anti-Racism, Team (H.E.A.R.T.). The charge of developing the VP Heart job description and defining center services for an office of humanism, equity inclusion and diversity are well on the way to completion.

The visiting team noted how these various focus areas were intended to respond to the following demands from the White Coats for Black lives: 1) the call for lectures and discussion devoted to racial justice; 2) require students to take an anti-racism/racial sensitivity course prior to graduation; 3) institute a Diversity, Equity and Inclusion Center; and 4) accept/ recruit more students and faculty from underserved backgrounds (racial minorities, those of low socioeconomic status, etc.). While the intentions were well articulated, detailed, and appeared to have the support of most of the stakeholders the visiting team met with, these are still not yet realized plans.

The team meeting with the H-SPG was encouraging and the team leaders reported being particularly happy that the work that has been happening individually was now coming together and a synergy has been created to allow for exponential growth. Evidence of that growth was found in the recently adopted WesternU HDEI statement that is posted on their website which states:

WesternU students, faculty, staff, and administration are committed to fostering a culture of respect and equity at all levels and for all people. We engage in meaningful efforts to enhance our diversity and eliminate barriers to success through thoughtful policies and practices. We embrace the varied backgrounds, beliefs, and voices of the people who make up our University for how they enrich our educational, personal, and professional experiences. We create an inclusive environment by encouraging healthy discourse and empowering individuals to be their authentic selves. We strive to dismantle health disparities and broader systemic injustices that disproportionately affect persons of color and the economically, socially, and physically disadvantaged. These values go hand in hand with our humanistic tradition and our mission to enhance the quality of life in our communities.

While the adoption of the above institutional statement was a vital step in articulating a commitment to HDEI principles, the H-SPG group acknowledged that there was still work to do. Many of the team meetings included comments on the importance and priority among many stakeholders of developing a University HDEI Center and hiring a leader. Importantly, the President approved the title of Vice President for Humanism, Equity and Anti-Racism (HEART VP). The H.E.A.R.T. team included representatives from the Academic Senate, Operations and Dean's Councils. The four college diversity officers, students from WC4BL, university legal-council and HR. Importantly and as stressed in many of the meetings that members of the visiting team attended, the plans were that the individual in this position will be adequately resourced and will sit at a top-level position. The Vice President for Humanism, Equity and Anti-Racism is planned to "provide a voice that ensures all individuals and groups on campus will be seen and heard" and will champion efforts to recognize and celebrate diversity. Moreover, it is intended that the HDEI center will provide "a safe and supportive space for those who need it."

The team met with the Humanism, Equity, Anti-Racism Team (H.E.A.R.T.) along with some members of the Search Committee for the new H.E.A.R.T. Vice President's position. A number of the members of the group were directly involved in HDEI support roles around the university. The group spoke enthusiastically about the HDEI advances in the University and were hopeful about the new VP position. Although this particular group was going to be disbanded, the participants with whom we met felt that progress had been made at the University particularly during times of great diversity challenge in the broader community. The H.E.A.R.T. group had been involved in a number of activities in the past year including those related to Black Lives Matter. The group generally agreed that more work needed to be done to identify outcome measures to assess the effectiveness of HDEI initiatives. Although many had played a helpful role when asked to assist faculty or the academic staff, it was noted that more work was needed to diffuse HDEI throughout the institution and curriculum. The visiting team noted in

several meetings that there seemed to be some disagreement on what the letter “T” stood for in the H.E.A.R.T. acronym. In some settings the T referred to “Team” and in others it referred to “Transformation.” This is probably something to be worked out when the new HEART VP is hired.

The visiting team was pleased to be able to meet with several student groups which included open sessions with Pomona Students, open sessions with WesternU Oregon students, minority groups and clubs and the White Coats for Black Lives (WC4BL) group. WC4BL included students from both campuses and also included members from the other students that the visiting team met with. They were an impressive group of students. They expressed many concerns but were particularly focused on ways to improve the curriculum and feel they have been at the front for making change happen. WC4BL was established in 2020 with the mission of eliminating racial bias in the practice of health science and recognizing racism as a threat to the health and well-being of people of color. One of the goals of this mission is to “improve the recruitment and support of Black, Latinx, and Native American health science students. Promote the recruitment, retention, and hiring of Black, Latinx, and Native American health science professionals in health science school teaching, research, and leadership positions. Develop national health science school curricular standards that educate current and future health science professionals on the history and current manifestations of racism in the health sciences, principles of anti-racism, and strategies for dismantling structural racism.” Several members of this group expressed concern about the kind of diversity training they are receiving in the curriculum especially with respect to the actual clinical practice with diverse populations including LGBT communities.

Another important issue is whether WesternU has established strong support for diversity, equity, and inclusion across all colleges. This issue arose in respect to the Master of Science in Medical Sciences program from the Graduate Colleges of Biomedical Sciences to the College of Health Sciences. The visiting team learned from one of the faculty groups and from confidential e-mails that this move was justified at least in part on the basis that it would put the MSMS students in a college with more diverse faculty such that the students would feel more comfortable. It was also noted that the MSMS program has a disproportionately higher number of underrepresented minority students, that graduation rates were lower than the WesternU than in other programs, and that moving the students to a new college would help improve support for students on the program. This suggested that there may be unevenness in diversity across the colleges, an issue that would appear to need attention.

In meetings with several stake holder groups and corroborated by confidential e-mails, the visiting team learned that many were hopeful that our report would recommend that WesternU make all the necessary changes to truly eliminate racism and bias from the campus culture, the curriculum, the hiring practices, and the admissions process. They would like for WesternU to intentionally contribute to a more diverse health professions workforce by properly funding, resourcing, and empowering the individual who will be chosen as the Vice President of Humanism, Equity, Anti-Racism and Transformation (VP of HEART) and the HDEI center.

WC4BL viewed themselves as having made significant contributions to a DEIAA curriculum through the creation of Interprofessional Workshops (IPE) in which over 1800 students, faculty, and staff participated. Other student groups confirmed that these IPE workshops were valuable in helping them to understand important issues around medical care in diverse and often disadvantaged communities and how attending to these communities can begin to address healthcare disparities. It has also made them more aware of microaggressions. As one student put it “White Coats for Black Lives has brought Lebanon and Pomona together and pushes me to be more proactive in my endeavor to be anti-racist. One of my biggest roles in healthcare is to be an advocate for our patients. You can try to understand your patients’ experience and listen.”

Although several stakeholder groups expressed their gratitude for the support from many university decision-makers, they also expressed concern that there are still powerful administrators who have been resistant to making meaningful DEIAA changes at WesternU. **Thus, the visiting team’s recommendation that WesternU must continue to enhance institutional policies, educational and co-curricular programs, hiring and admissions criteria, and administrative and organizational practices with respect to diversity, equity, and inclusion is consistent with student wishes. To assure this is happening, the administration, staff, and faculty must collect and analyze data to track and address the extent to which the learning environments support student success and then to act on the collected data to take actions to improve student outcomes.**

C. Shared Governance CFR 1.7, 3.6, 3.7, 3.10, 4.3

WesternU has initiated significant steps to engage the creativity and insights of faculty to improve the quality of education and research. The Board, administration, faculty, and staff continue to strengthen shared governance initiatives, implement them throughout the university, and enhance bidirectional communication between all levels of WUHS so that front-line faculty and staff are fully engaged and have psychological safety to help improve the educational environment and innovate.

Relevant Background and Institutional History

Shared governance at WesternU has been a concern of the WSCUC for at least two decades.

In its Action Letter dated July 10, 2013, the Commission stated the following.

Creating an effective faculty governance model. Faculty governance has been a topic of Commission deliberations and action letters as well as an ongoing concern of visiting teams for 12 years. Faculty governance at the institution-wide level is critical to a graduate-level university. Recent efforts for example, the restructured academic senate, examination of institution-wide policies and procedures, and revisions to the faculty handbook — are all promising. However, the Special Visit team's report described "limited progress . . . in development of a more robust faculty governance system" and concluded that faculty members "are not engaged in the expected leadership role in

academic quality assurance expected by WASC and typical of higher education." The Commission expects to see tangible progress in implementing a model for faculty leadership at the university level that includes, for example an efficient senate and committee structure, clear systems for peer review, ownership of institutional learning outcomes and their assessment, setting curriculum and academic standards, participation in new program development processes, maintenance of general academic policies and procedures, and participation in planning. (CFRs 1.3, 3.8, 3.11, 4.6)

In its March 6, 2015 letter, the Commission again raised concerns about Shared Governance.

Continue developing faculty participation in shared governance. The Commission expects WesternU to continue developing its Academic Senate structure and operations, with attention to: 1) reviewing and clarifying the roles, responsibilities and titles of the three Senate standing committees to ensure alignment of intent with committee practice and to eliminate unnecessary duplication; 2) increasing faculty engagement in reviewing academic policies and setting academic standards across colleges; 3) formalizing ways for increased and systematic faculty input into priorities for resource allocation; and 4) establishing a process for university-level review and approval of revisions to the curricula. In addition, WesternU is expected to evaluate the effectiveness of its new Senate structure and make changes, as appropriate. (CFRs 3.7, 3.10)

In its July 20, 2018 action letter, the Commission's statement on shared governance suggested improvement. It stated:

Shared Governance CFR 4.2, 3.4, 2.7 WesternU has initiated significant steps to engage the creativity and insights of faculty to improve the quality of education and research. The Board, administration, faculty, and staff continue to strengthen shared governance initiatives, implement them throughout the university, and enhance bidirectional communication between all levels of WUHS so that front-line faculty and staff are fully engaged and have psychological safety to help improve the educational environment and innovate.

The current Special Visit team found that the progress in shared governance reported in 2018 had not persisted. After the team was advised of two additional No Confidence votes by the Academic Assembly/Academic Senate following the earlier one against the President. In March 2021, the University agreed that shared governance would be a third focus of the site visit. It then provided a supplement to the original report on shared governance. Although the Supplement added useful information, it still did not adequately describe the reasons for the No Confidence vote as articulated by the Academic Senate/Assembly.

The original Report mentioned "shared governance" only 4 times. That was because that area was not a specific focus of the Special Visit. However, information about shared governance developments would certainly have been relevant to the WASC team's review of Board actions. The following article appeared in the Inland *Daily Bulletin* (a public newspaper) on October 10, 2020: <https://www.dailybulletin.com/2020/10/22/western-university-presidents-decision-to->

[step-down-comes-3-months-after-no-confidence-vote/](#). (The accuracy of some of the information in the article was questioned by the University.)

In July, faculty members approved a vote of no confidence directed at Wilson due to what they called his lack of transparency. Faculty members passed the no-confidence vote 123-35, agreeing that Wilson disregarded one of the university's core principles of shared governance with them, administration and trustees. The university has about 350 full-time faculty. An Ad Hoc Committee of the Board of Trustees was created in response and was to conduct an investigation into what led to the no-confidence vote.

Results of the investigation have not been publicly released. It was not clear if the probe has concluded or, if it was, whether the findings were a factor in Wilson's decision. The spokesman, who issued the release on behalf of the board, declined to address questions about the investigation. The university spokesman referred all questions to the board.

After the decision to add Shared Governance to the focal areas of the visit, Minutes of the Faculty Senate and the Faculty Assembly (FA) and the Faculty Handbook were requested and promptly provided by the ALO. The team also requested and received a number of documents related to shared governance and decision making at WesternU. Most, but not all, of the shared governance problems seemed to have been directed to involve the Senior Leader/Academic Senate level. The team also heard a number of examples of what appeared to be well-functioning shared governance in the colleges where decision making seemed to work well. We did, however, hear complaints that in some colleges decision-making was problematic. The team also heard instances staff members did not feel included either in relevant decision making or in learning about decisions already made that affected their positions. The team was pleased to learn that a new Staff Council was being created but surprised to learn that no staff member was included on the presidential search committee and that in some instances staff had apparently been instructed not to speak with Board members.

During our visit we explored the concerns that led to these actions, reviewed shared governance documents, and explored the topic in detail with most of the groups and individuals with whom we met. Here we will summarize some of the evidence that was gathered, describe the team's concerns, and its recommendations.

Summary of Findings

No Confidence Votes

A. Faculty Concerns - In the midst of the University's successful management of the COVID period, impressive outcomes in difficult times as evidenced by a successful transition to on-line instruction, solid, financial results, progress in fund raising, re-making the Board, and expanded HDEI initiatives, the Academic Assembly in collaboration with the Academic Senate voted No Confidence in the University's President in July, 2020 and subsequently, in late 2020, and after

the President had announced his retirement, in the University's Provost and the Senior Vice President for Research.

The team reviewed the agendas and minutes of the Academic Assembly and Academic Senate but found them sometimes lacking in sufficient detail to understand the processes used to a) understand concerns by the Academic Senate/Academic Assembly; b) how the concerns were raised with the parties against whom No Confidence votes were raised before the votes; c) the specific processes that were used to obtain the votes; d) the manner in which the votes and supporting information were communicated and to whom; and e) whether those who were the targets of the votes communicated responses to the concerns that had been raised to the Academic Assembly/Academic Senate and to other groups (e.g., the Board). Apparently, there were only two meetings of the Academic Assembly in 2020. The July 8, 2020 meeting addressed both Shared Governance and the No Confidence vote taken against President Wilson. The relevant minutes, more detailed than most that we saw, stated (relevant names and positions are masked):

3. Old business Shared Governance updates

*The shared governance principles were reviewed in the context of the prevailing conditions in the university. The lack of communication from the administration and unwillingness to partner with the faculty were highlighted. UFAC described the *** sent to [...] with a copy to [...]. Other concerns related to [...], unresponsiveness to faculty letter, various issues related to the [a center] and the Center's Director, lack of cooperation by administration with Grievance Committee, no action on Intellectual Property, no faculty input for external programs, no faculty involvement in university budget, and no faculty purview for CFI renovation and animal vivarium. The unprofessional interaction of the President toward the senate chair was also described. All these issues were described as becoming progressively detrimental to the health of WesternU. What does the 40% satisfaction with President, 29% satisfaction with the [...] and 20% satisfaction with the [...] indicate about the WesternU administrative leadership? The presentations concluded with a question for the faculty: "are we better off today in terms of shared governance, transparency, communication, and mutual respect than we were before the arrival of [...the president]?"*

4. New Business Consideration of postponed motion for vote of no confidence in [the president's] leadership. The results of the vote of no confidence to be transmitted to the Board of Trustees, Deans Council, SGA President, the President, and the faculty. The postponed motion was placed on the assembly floor for further discussion.[...] served as the parliamentarian for the meeting. The initial motion was amended, and the original mover accepted the amended motion and stated the motion again, and it was viewed on the screen by faculty-at-large. Several members of the faculty spoke for the motion, and a few members spoke against the motion. After an orderly debate on the amended motion, the question was called to terminate the debate and initiate the vote. After the termination of the debate, the resolution was presented again on the screen and the chat box for members to view and the faculty were asked to indicate their

approval (yes)/disapproval (no) on the 'vote of no confidence in the leadership of President [..].

The motion to terminate the debate was approved with a vote of 139-27. The motion expressing 'vote of no confidence' in [the president's] leadership was adopted with a vote of 123-35.

In examining various documents and the information learned in our meetings with members of the faculty and Academic Senate, we identified a number of specific issues of concern to the Academic Senate and to some faculty members. These included:

- 1) unhappiness that the salaries of those making more than \$100,000 were cut by management during the pandemic (these have since been restored);
- 2) concerns over the lack of a consultative process surrounding the allocation of lab space by a senior administrator, and a perceived conflict of interest surrounding the allocation of lab space by the senior administrator to himself.
- 3) the movement of the Master of Science in Medical Science (MSMS) from the Graduate College of Biomedical Sciences to the College of Health Sciences.
- 4) creation and filling of a new position of Senior Vice President of Research without use of the expected search committee or faculty consultation;
- 5) the perception in some colleges that faculty were pressured to support particular faculty candidates for hire or promotion under threat of their own continued employment;
- 6) an apparent movement in some colleges away from using core faculty in favor of hiring year-to-year or adjunct faculty;
- 7) perceived failure of the University's administration to listen to their perspectives, to involve them in any meaningful way in decision making on matters affecting academic decision making;
- 8) persistent failure of university administrators and the Board to follow what they described as being shared governance as defined in the Faculty Handbook (page 29) and the guidelines of the American Association of University Professors (AAUP);
- 9) the reported failure of the administration to provide laboratory infrastructure that was stated as existing in federal grant applications for which funding was awarded, specifically a BSL3 certified safety laboratory needed for small animal infectious disease research funded by the National Institutes of Health;
- 10) removal stated to have been done without faculty consultation of outdated chemicals in faculty researchers' labs by Administration without consulting and at a time when the faculty were away from the University due to Covid; and
- 11) perceived attempts by a senior academic administrator to change promotion and tenure criteria.

B) Responses of Administration to these Concerns and Allegations

The Team asked for copies of responses that were made by the three parties against whom No Confidence votes had been taken. We were provided a lengthy point-by-point response to the vote by one of the affected parties dated December 9, 2020 that had been sent to the University's President. We also received a review of the allegations against one of the other two senior administrators which also challenged a number of the concerns raised. It was not clear that either analysis/rebuttal had been shared with the Academic Senate/Assembly or the Board. We were also told that the Board of Trustees commissioned a review by an external evaluator regarding President Wilson. Clearly, the two documents we did receive challenged many of the allegations made by the Academic Senate/Assembly's and in some cases provided the rationale for decisions made to which objection had been raised.

Concerning the Senate/Assembly's own processes we were provided a copy of a communication from the University's attorney identifying legal and procedural steps needing to be followed by the Senate/Assembly in its deliberations and actions. In one session, a University attorney noted that the Senate had been provided guidance on applicable laws and the need to follow the Bylaws of the Senate/Assembly but that "they chose to go another way."

C. The Team's Conclusions

It is not the WASC team's role to adjudicate the correctness of respective positions in the No Confidence votes. It would appear, however, that the Academic Senate/Assembly and senior Administrators have not been working together effectively, particularly in their identifying, properly assessing, and working through their areas of disagreement. The failure to resolve the sharply differing views appeared to have resulted in lingering anger and distrust and difficulty in working effectively together.

In the next section, we will identify some of the factors we identified that need to be addressed as part of the process of improving shared governance.

Factors Potentially Contributing to Impasse on Shared Governance

The WASC Site Visitors solicited input from a number of groups and individuals with whom we met. In each case we inquired about the current state of shared governance and what had been done to address problematic areas, and thoughts about how the university can best move forward. Major themes from these meetings are summarized in the section.

A. Mutual Lack of Trust Between Academic Senate and Administration –

A general theme from our meetings was that the various constituency groups (including faculty, their representatives, administrators, and some Board members) was a large and apparently growing lack of trust between the faculty representatives, senior administrators, and the Board. It was difficult to identify all sources of mistrust but major institutional change are one likely contributing factor. Since the departure in 2016 of its founding president, Dr. Pumerantz, the

first, and for 40 years, the only, president of the University, many institutional changes have occurred. The University's President, Dr. Wilson, and the senior administrators were all fairly new in their roles. Many of the changes undertaken since Dr. Pumerantz's retirement have been consistent with the recommendations from WSCUC over the years. They have included major changes in the Board, expanded staffing in several key institutional functions, expansion of HDEI initiatives, new academic programs, and many others. Thus, a rather stable institution has been undergoing major change in a period of pervasive change and uncertainty associated with Covid and other societal challenges.

Even though disagreements are probably inevitable in such circumstances, conflict, especially between faculty and administrative leadership, does not appear to have been resolved effectively. Indeed, the returning members of the current WSCUC team found evidence of deteriorating trust since the most recent site visit. The inability of the parties to work through their differences appear to have resulted in a growing mutual distrust resulting in a stalemate that the team felt is not sustainable overtime. Mutual trust is an important component of effective shared government. Although trust cannot be forced, it can be developed or re-gained. This may well involve the need to identify and working through perceived differences so a new, less contentious, path forward can be created.

B. Lack of Agreement on What Constitutes Shared Governance-

It became clear to Visiting Team that Faculty, the Administration, and the Board do not agree on the base parameters or even the meaning of shared governance. Faculty Senators insisted that the guidance of the AAUP and the Faculty Handbook were very clear on what shared governance meant. The interpretation we heard several times from Faculty Senate members was that the faculty controlled the curriculum and needed to be consulted on most other issues affecting the faculty including lab space, hiring of administrators, and budgets.

For their part, senior faculty administrators reported that they had indeed consulted faculty and faculty groups on a number of issues but they did not always agree with the views of those consulted. The point was made on several occasions by senior administrators or board members that shared governance may require the obligation to consult, but it does not include the requirement to accept the opinions or recommendations of the groups consulted. However, the team was puzzled by the many reports it received that faculty had not been informed in advance of decisions made by administration, or of the reasons for the decisions made or actions taken.

Some efforts were reported to address this lack of consensus on shared governance. The institutional report noted that "the Board is committed to enhancing communication within the University. They are working with the goal of strengthening shared governance, and ultimately, our ability to serve our students and the larger community (Appendix 5.01 Email from the Board 10-21-2020). As part of this effort, the Board formed a shared governance task force with the charge of delivering a clear statement of principles and practices to the Board by May 2021 (Appendix 5.02 Email from the Board 11-23-2020). The task force includes the chairs of the

Board's Academic Affairs and Governance committees, Chair and Vice Chair of the Academic Senate, a student representing the Student Government Association, the provost, one dean representing the nine colleges, and one staff member. The task force will provide updates and solicit input from the community in carrying out its duties." The team noted the Board's active role in convening the Shared Governance Task Force rather than assuming the role of oversight. The team met with several of the members of this group and the group's consultant. It was stated by the one individual that the group's primary purpose was to agree on defining terms associated with shared governance. This was felt by a group member to be too limiting in that participants were not allowed to consider, even as examples, current areas of disagreement between management and the faculty about shared governance or even to bring in examples of areas of concern between faculty and administration. Although the Board has a place in assuring that an effective shared governance program exists and is being followed (WASC standard 3.9, "The institution has an independent governing board or similar authority that, consistent with its legal and fiduciary authority, exercises appropriate oversight over institutional integrity, policies, and ongoing operations, including hiring and evaluating the chief executive officer."), it was not clear to the team that the Board's role needed to be so directly involved in the process of resolving shared governance issues.

It became clear to the team that the Administration and the Faculty leadership have sharply differing views on what constitutes shared governance. Those differences need to be identified and worked through. The role of the Board in this process should also be articulated.

C. Lack of Clarity and Shared Understanding on Where Decision-Making Authority Lies and why specific decisions are made

Several instances were reported to the visiting team that suggested lack of understanding or agreement about who had decision making authority for particular decisions. Clarity is needed as to which decisions are to be made by the University's President, Provost, Deans, other administrators, the faculty (through its Senate and Assembly), or those in particular staff positions. Decision-making authority in a shared governance model requires understanding of who the ultimate decision makers are, which groups are consultative, and who assumes responsibility for outcomes.

The team heard inconsistent reports about why particular decisions had been reached. An evidence-based culture that assures that all relevant information is gathered before reaching a decision was seldom evidenced. The team felt that a much more disciplined and articulated process, and that an effective consultation process should include information about the parameters of the decisions to be made, and, once they decisions are made, their rationale.

D. Lack of Clarity and Shared Understanding About How Decisions, Once Made, are Communicated to Relevant Stakeholders

In several cases the team heard competing versions of particular incidents that could not all be true. When decisions are made, undoubtedly some will agree with them and others will not. At

the least, decision makers need to communicate with relevant stakeholders and those consulted why particular decisions were made, on the basis of what evidence, and as appropriate, why alternative ideas or views did not prevail.

E. Lack of Clarity and Shared Understanding About How Decisions, Once Made, are Reviewed and Evaluated as to Their Effectiveness

The team heard concerns about who is to make particular decisions than we did about how decisions, once made, would be evaluated as to their effectiveness. Of course many decisions have to be made on the basis of limited information and in a timely manner but, especially for high stakes decisions affecting many parts of the university, it is important to regularly evaluate major decisions as to whether the intended goals were achieved, what tweaks need to be made in an adopted process, and the effectiveness of the decision-making process used in making such decisions. Even decisions made with appropriate input and that are evidence-based sometimes will not succeed. Effective leadership re-examines such outcomes and learns from mistakes.

F. Not Working Through Differences in a Constructive Way, Allowing Discrepancies in Perceptions to Continue

The team observed that the problems and sharply differing views on decisions made and on the shared governance parameters and processes had been allowed by all parties to fester and deteriorate. In addition, there was evidence of parties to shared governance talking over, rather than to, each other. Blatantly different views that cannot all be true have persisted, seemingly to the satisfaction of no one. New strategies are therefore urgently need to be found to manage differences. This might include reviewing areas of difference, a clear commitment to healing the festering wounds, and a specific plan to move forward with a better shared governance process.

SECTION IV – FINDINGS, COMMENDATIONS, AND RECOMMENDATIONS

Commendations

The visiting team would like to commend:

1. Western University of Health Sciences for its demonstrated commitment to honest and open communication with the Accrediting Commission; to undertaking the accreditation review process with seriousness and candor; and to informing the Commission promptly of the issue on Shared Governance.
2. The Board for expanding its membership; increasing diversity and expertise; improving governance bylaws and independence; and devoting energy and time to its fiduciary responsibilities.

3. Students, faculty, staff, administration and the Board for their passion and responsiveness to societal concerns about justice, diversity, equity, and inclusion. This is demonstrated through initiation of:
 - a. additional scholarships;
 - b. the enhancement of support services;
 - c. commitment to pipeline programs in the community;
 - d. enhancements of campus inclusivity;
 - e. planning of new programmatic and administrative structures (with resources);
 - f. changes in policy; and
 - g. the inclusion of HDEI in the curricula.
4. Administration, staff, faculty and students for responding to the pandemic by converting to distanced delivery of education (including leveraging the experience of the Lebanon campus distance learning team), maintaining financial stability, and continuing to educate learners.
5. Faculty, staff, administration, and the Board for their obvious and deep-seated dedication to student success.

Recommendations

The team recommends the following:

Board of Trustees (CFR 3.9)

1. Although the board has responded to the previous report by executing its fiduciary authority with dedication and loyalty to Western University of Health Sciences, it must
 - a. continue to seek members with the diverse qualifications required to govern an institution of higher learning;
 - b. regularly engage in self-review and training to enhance its effectiveness; and
 - c. maintain and honor clear policies on shared governance consistent with the Board's oversight role.

Diversity (WSCUC Equity & Inclusion Policy, CFRs 1.4, 2.2 and 3.1)

2. The Board, administration, faculty, staff and students should continue to assess and address the changing social and demographic diversity within the communities that they serve.
3. Western University of Health Sciences should expand their efforts to create diverse and inclusive learning environments at both campuses and at community-based clinical sites including:
 - a. implementing and resourcing the H.E.A.R.T. Center and hiring the Vice President of H.E.A.R.T. and support staff, and other HDEI initiatives and
 - b. collecting and analyzing data to track and address the extent to which the learning environments support student success and then to act on the collected data to take actions to improve student outcomes.
4. The administration, staff, and faculty must continue to enhance institutional policies, educational and co-curricular programs, hiring and admissions criteria, and

administrative and organizational practices with respect to diversity, equity, and inclusion.

Shared Governance (CFR 3.6, 3.7 and 3.10)

5. Leadership at all levels (including faculty, staff, and administration), must commit to ensuring shared governance decision-making and maintaining effective communication by:
 - a. creating an environment of psychological safety and work to air and resolve differences in a constructive manner;
 - b. clarifying and agreeing to the respective roles and lines of authority of all parties involved in shared governance;
 - c. ensuring use of evidence to support decision-making; and
 - d. promptly and clearly communicating decisions along with the evidence and rationale so that stakeholders have a shared understanding of the evidence and rationale underlying the decision.