

Special Visit Institutional Report

from

California Institute of Integral Studies

1453 Mission Street

San Francisco, CA 94103

to

Western Senior College and University Commission (WSCUC)

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Submitted by

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SECTION 1

Nature of the Institutional Context and Major Changes Since the Last WSCUC Visit

CIIS History, Mission, and Values

California Institute of Integral Studies (CIIS) was founded in San Francisco in 1968 as the California Institute of Asian Studies (CIAS), an educational center of the Cultural Integration Fellowship, a nonprofit, non-denominational religious and cultural organization. In 1980, the name was changed to California Institute of Integral Studies to better reflect the integral philosophy that remains central to its educational approach. Since its inception, CIIS has been a pioneer in integral teaching and learning, offering innovative degree and non-degree programs that explore multiple aspects of the human experience. Programs combine academic rigor with a learning environment designed to be personally and socially transformative. CIIS is known for its counseling and clinical psychology programs, its merging of philosophical traditions, its integration of eastern and western world views, its dedication to multiple ways of learning and knowing, and its recognition and affirmation of spirituality. These attract students, faculty, and staff who are seeking to make a positive impact in the world. An orientation to healing is found throughout the university, in programs directed towards physical and mental health and wellness, and in a strong commitment to sustainability, ecology, and social justice. CIIS honors diverse traditions and world views. It was an early adopter of online learning, recognizing its potential for expanding access; CIIS has long sought ways to make its integral approach to education accessible to those unable to reside in the Bay Area.

Originally a graduate school, in 1993 the university extended its academic programs to include undergraduate education, introducing a bachelor's degree completion program. In July 2015, the American College of Traditional Chinese Medicine (ACTCM), founded in 1980 as a private, independent graduate school, merged with CIIS, becoming its fourth school.

CIIS is guided by three foundational statements: its Mission, Purpose, and Seven Commitments. The latter are aspirational declarations intended to inform and advance the stated mission and purpose.

[Exhibit 01a: CIIS Mission, Purpose, and Seven Commitments](#)

Enrollment

CIIS currently offers 30 degree programs or concentrations: two bachelor's degrees, 15 master's degrees; nine PhD degrees, and four professional doctoral degrees. Programs are offered in face-to-face, hybrid, and online modalities. Online programs typically include a face-to-face component at the start of each semester. All classes have their own online space in Canvas, CIIS's learning management system,

for supplemental work and posting of course materials. Four programs employ a cohort model: Bachelor of Arts, Bachelor of Science, Master of Arts in Counseling Psychology (all five concentrations), and PhD in Human Sexuality.

Fall 2019 enrollment was 1,511 students, 70 of whom were at the undergraduate level and 1,441 at the graduate level as follows:

- Bachelor of Arts 45
- Bachelor of Science 25
- Master of Arts 752
- PhD 482
- Professional Doctoral 196
- Special Students 11 (auditors, non-matriculated, and registration maintenance)

CIIS has a vibrant Public Programs department, offering events, workshops, and continuing education at the Mission Street campus and in various venues in the Bay Area. Public Programs provides exposure to CIIS, supports recruitment, and is a valued venue for faculty scholarship and professional development. Membership and attendance at Public Programs exceeded 11,000 in fall 2019, with listeners to their podcasts totaling 180,000 in the same period.

[Exhibit 01b: CIIS schools, programs, and degrees](#)

[Exhibit 01c: Enrollment 2015-2019](#)

Facilities and Location

CIIS conducts its central operations in university-owned facilities at 1453 Mission Street in the mid-Market area of San Francisco, a growing technology hub for the city. The central building is supplemented by a leased site in nearby Potrero Hill (455 Arkansas Street), the primary home of ACTCM. Five sliding-fee community counseling centers are in various leased locations throughout San Francisco, with a sixth free clinic located at several San Francisco Housing Authority sites. MA and PsyD students also have practicum and internship placements in agencies throughout the greater Bay Area and beyond. Acupuncture is offered in a public clinic at the Arkansas campus and twice a week at the Mission campus; ACTCM students also undertake practicum experience at sites throughout the Bay Area.

Accreditation

CIIS has been continuously accredited by WSCUC since 1981. ACTCM at CIIS is additionally accredited by the Accreditation Commission for Acupuncture and Oriental Medicine (ACAOM), with accreditation of its Master of Science of Traditional Chinese Medicine since 1991 and its Doctor of

Acupuncture and Oriental Medicine since 2012. ACAOM granted ACTCM permission to offer the Doctor of Acupuncture and Chinese Medicine in 2014. These two doctoral degrees were approved by WSCUC at the time of the merger in November 2014, and a related distance program designed for practitioners, the Transitional Doctor of Acupuncture and Chinese Medicine, was approved by WSCUC in December 2019.

CIIS had its most recent full WSCUC accreditation visit in November 2016. This was during a time of considerable transition and turmoil for CIIS, as the university was addressing a substantial projected deficit and the president was placed on sabbatical and the provost appointed as interim president just prior to the visit. The Commission placed the university on Warning due to concerns about financial stability, leadership, and strategic planning. A report and special visit were required with a focus on financial strength and sustainability, strategic planning, and leadership. The Special Visit took place February 21-23, 2018; on June 28, 2018, the Commission acted to remove the Warning status and issued a Notice of Concern. A progress report on marketing and enrollment was submitted as requested in February 2019. The current Special Visit Institutional Report and planned one-day visit scheduled for April 2020 addresses strategic planning and financial sustainability. The most recent Commission letter identified five recommendations relevant to these topics:

1. Implementation of the Federal Composite Index Score
2. Identification and implementation of the current strategic plan
3. Progress towards strategic plan objectives
4. Integration of the Diversity and Inclusion Strategic Plan and progress towards its objectives
5. Confirming the central role of the faculty

[Exhibit 01d: Recent WSCUC communications and actions](#)

Major Changes since the February 21-23, 2018 Special Visit

It was an instructive process to review changes since the 2018 Special Visit, a period of under two years at the time of writing. CIIS, along with most small private colleges and universities, is in a process of continuously adapting and adjusting goals, plans, and operations to meet changes within its institution, neighborhood, state, nation, and the field of higher education while retaining fidelity to its Mission, Purpose, and Commitments. This adaptive process reflects trends and best practices in institutional strategic planning with the timeframe now recommended for a strategic plan to be approximately three years. The university must balance devotion to continued excellence and innovation in teaching, learning, and scholarship and ensuring financial stability and sustainability, with the need to flexibly and nimbly amend plans to meet changing circumstances. The sections of this report

that address the strategic plan are illustrative of changing circumstances and resulting modifications to the strategic plan developed in 2017.

The university identified the following as major changes since the 2018 Special Visit.

1. **International considerations.** CIIS has experienced challenges with obtaining visas for students and staff from China and a general tightening of international student visas. This has impacted the planned expansion of its China Projects initiatives, which had been projected to be a significant source of strategic growth and non-tuition revenue. CIIS continues to welcome students from China, send ACTCM students to China for field experience, and has several professors traveling to China to offer workshops, but is reassessing its strategy for China Projects. The university is considering more online offerings and programming in China with fewer programs to be held in San Francisco and is working to develop new strategic partnerships.
2. **Landmark anniversaries.** CIIS celebrated its 50th anniversary in 2018-19, culminating in a gala at the top of the new Salesforce tower. It is now preparing to celebrate ACTCM's 40th anniversary in spring 2020.
3. **Senior staff changes.** The university has a new Vice President of Finance, Gail Bergunde, CPA, CGMA, who replaced an interim vice president. The Vice President of Institutional Advancement, Jillian Elliott, has been in her position for 18 months and has incorporated oversight of alumni development, Public Programs, the Arts at CIIS, and the Center for Psychedelic Therapies and Research, ensuring coordination of all public-facing and fund-development work. The president has appointed Dr. Richard Buggs, a long-time staff member, as Chief of Staff, a position that has significantly enhanced leadership capacity and builds future continuity. The Dean of ACTCM, Dr. Bingzeng Zou, announced in 2018-19 his intention to step down and to focus on direction of the ACTCM clinic. CIIS conducted a national search for his successor; Dr. Carla Wilson accepted the position and began her work in July 2019. Three deans vacated their positions in June 2019: Dr. Kathy Littles, Dean of the School of Consciousness and Transformation (SCT), and Dr. Denise Boston, Dean of Diversity and Inclusion, accepted career-advancing positions at other universities, and Dr. Nicolle Zapien, Dean of the School of Professional Psychology and Health (SPPH), entered advanced psychoanalytic training. After an initial search and review, it was decided to not fill the two academic dean positions for the current year in order to assess the different needs of each of these schools. The university has

revised the focus of the Office of Diversity and Inclusion from academic to institution-wide and appointed Rachel Bryant as Director of Diversity and Inclusion.

- 4. Conversion to Ellucian Colleague.** CIIS has recognized for many years that its Jenzabar database system was insufficient for its needs and inefficient in its operations. In 2018 the Office of Institutional Effectiveness conducted an analysis of alternative systems, leading to the recommendation that CIIS adopt Ellucian's Colleague system. Conversion from Jenzabar to Ellucian began in summer 2019. This is a massive undertaking for a university the size of CIIS but is absolutely essential if it is to be able to achieve the goals of increased efficiency and effectiveness. Anticipated benefits of the new system include more thorough, nuanced, and timely reporting, enabling significantly improved data analytics. The conversion is anticipated to be completed in 2021.

SECTION 2

Statement of Report Preparation

This Special Visit Institutional Report addresses financial sustainability and strategic planning. In accordance with WSCUC guidelines for a Special Visit Report, preparation was focused and was not intended to be a full self-study. Report preparation was primarily the responsibility of Associate Provost Chip Goldstein in his role as WSCUC Accreditation Liaison Officer, with assistance from President Judie Wexler and Provost Liz Beaven. Preparation included a review of former WSCUC actions and reports, an analysis of progress on the strategic plan, and collation of data from a range of stakeholder groups and individuals including various faculty governance committees, the Board of Trustees, the Finance Department, the Office of Diversity and Inclusion, Admissions, Marketing and Communications, and Institutional Effectiveness.

The Faculty Executive Committee and full Faculty Council (comprised of all core faculty members) received updates on the report and its contents as it was drafted. The final draft was reviewed and approved by the Faculty Executive Committee, the President's Cabinet, and the Executive Committee of the Board. As it was being finalized, the report was made available to faculty and staff with an opportunity for comment.

SECTION 3

Responses to Issues Identified by the Commission and Last Visiting Team (February 21-23, 2018)

A. Finances and the Federal Composite Financial Index (CFI) Score (CFR 3.4)

The university has maintained a steady focus on financial sustainability with thorough analysis of income and expenditure and initiatives to diversify revenue beyond a primarily tuition-driven model. The president and Board recognize that a new, more diverse financial model will be required to survive and thrive in today's higher education context. Work to reduce expenses and increase efficiency will not be sufficient in itself and is being accompanied by the further development of other income streams including: a new alumni development campaign (headed up by a new associate director of alumni services); expansion of Public Programs; development of an innovative, nationally acclaimed Center for Psychedelic Therapies and Research; grant support for the community clinics; enhanced donor stewardship and cultivation; and continuing collaborations with universities and organizations in China. Each of these holds promise for adding to the university's ongoing sustainability. With the exception of China Projects and two of the seven clinics, all have grown in income over the last two fiscal years.

In April 2019 CIIS completed a major refinance of 1453 Mission Street using tax-exempt bonds. This refinance brought the mortgage interest rate down from 4.50 - 5.25% to 3.85% (tax exempt) / 4.52% (taxable) and gave the university the ability to add on to its existing loan up to a total of \$20m. At the same time CIIS reduced its debt by \$1,258,273, from \$15,863,704 to \$14,605,431. The refinance enabled the university to repair the crumbling historic building façade and to begin the change from its Jenzabar system to Ellucian's Colleague system. The latter is key to increasing efficiency, enhancing effectiveness in operations and financial analysis, and improving the student experience and feeling of connection to the university. The many manual work-arounds that had been adopted to make the Jenzabar system usable have become an impediment to being able to provide data to answer questions and provide timely analysis.

The 2016 Visiting Team recommended that CIIS employ the Federal Composite Index Score (unrelated to the Department of Education Financial Responsibility Composite Score) in order to assist in tracking and assessing fiscal performance. CIIS has adopted this tool to supplement the

Financial Responsibility Composite Score that had been historically used to track the financial responsibility necessary to participate in Title IV financial aid funding.

This significant strengthening of key financial indicators is a reflection of a consistent focus on financial responsibility and sustainability through strategic initiatives including: building and maintaining cash reserves; continued efficiencies; strengthening of internal controls; regular review of class enrollment and the timely consolidation or elimination of under-enrolled classes; growth in enrollment overall; attention to student satisfaction and success; improving retention; and analyzing and acting on new opportunities in areas of core functionality.

Building institutional reserves has been a priority for the Board and for university leadership. Success in doing this has to be balanced with the need to improve salaries and with concerns about student debt. Many salaries received upward adjustments in 2018-19 and all employees -- faculty, including adjuncts, and staff -- received a modest increase in salaries during the current fiscal year, 2019-20.

[*Exhibit 03a: Financial indicators \(revenue, expense, composite scores\)*](#)

[*Exhibit 03b: Non-tuition revenue 2017-2019*](#)

[*Exhibit 03c: Business debt schedule*](#)

[*Exhibit 03d: CIIS unrestricted net assets and expendable resources*](#)

B. Identification and Implementation of the Current Strategic Plan (CFRs 3.4, 4.6)

At the time of the 2016 WSCUC reaffirmation of accreditation visit, CIIS had recently concluded a new strategic planning process. As CIIS was addressing the financial challenges of 2016-17, the Board began in March 2017 to revise that plan in order to emphasize the continuing work needed to strengthen the university. At the time of the February 2018 visit, parts of the old plan were still being incorporated into the new one. The deans were still engaged with refining their initiatives directed toward achieving the goals of the new plan, and a separately-developed diversity and inclusion strategic plan had not yet been incorporated into the master strategic plan. The resulting confusion led to a team finding of incoherence in CIIS' strategic goals.

CIIS now has a unified strategic plan, with goals set through the 2020-21 academic year. This plan builds upon and clarifies the plan created in 2017, which in turn evolved from and superseded a comprehensive 5-year plan that had been developed in 2014 for the 2015-20 period. Changes within the university in 2016 required it to refine the 2015 plan to focus on urgent issues of financial and structural sustainability. The revised plan was narrower in focus, tighter in timeline, and more detailed in identifying persons or offices responsible and accountable for strategic initiatives.

Subsidiary plans that were developed for specific areas, including academics and diversity and inclusion, were developed in connection to the plan and were informed by its goals.

The strategic plan provides a three-year vision of revenue growth, efficiency, student connection, and diversity/inclusion. Accountability measures were developed for each of these areas and are presented as strategic initiatives with key measurement parameters. The parameters include projections through 2020-21 in key areas including enrollment and finances.

The plan addresses seven specific strategic initiatives:

1. Revenue: Increase tuition-based student count to ~1700 students.
2. Revenue: Assist revenue growth by increasing non-tuition revenue.
3. Connection: Expand new program delivery formats (e.g. online).
4. Connection: Increase inquiries through brand awareness and adoption.
5. Connection: Enhance student connection to increase graduation rate.
6. Efficiency: Keep institutional cost to total instructional cost ratio at 52%.
7. Diversity: Strive for diversity and inclusion.

[Exhibit 03e: Strategic Plan 2018-2021](#)

Diversity, equity, and inclusion are viewed as core to all initiatives; integration of diversity planning will be addressed later in this section. At WSCUC's request, detailed plans for admissions and marketing and communications were evaluated and revised by the university and were presented to WSCUC in a 2019 Progress Report. These were positively reviewed by WSCUC and are not a focus of this report.

A new strategic planning cycle is due to launch in the 2020-21 academic year. CIIS is anticipating a change in president in summer 2021 as the current president, Dr. Judie Wexler, has announced her intention to retire. Given that, CIIS expects that the next full cycle of planning will be postponed until a new president is installed. However, as part of an annual refinement and review process, the Board of Trustees is holding a strategic planning retreat on February 28, 2020, the first in an annual event on "integral futures." The trustees will be joined for part of the day by members of the CIIS faculty and staff and external higher education, business, and technology leaders in a World Café format to discuss trends in higher education and their possible impact on CIIS, opportunities to advance the university consistent with its core values, and a sober assessment of the tradeoffs.

C. Progress on Strategic Plan Objectives (CFR 4.3)

Revenue:

Increase tuition-based student count and non-tuition revenue

As previously noted, CIIS has seen overall growth in enrollment, with two of four schools -- the School of Consciousness and Transformation (SCT) and the School of Professional Psychology and Health (SPPH) -- exceeding strategic plan objectives in 2019-20. The School of Undergraduate Studies (SUS) and the American College of Traditional Chinese Medicine (ACTCM) did not meet objectives. At this stage it is predicted that the overall goal of 1,700 students in AY 2020-21 is not realistic due to a general softening of university enrollments, the unique economic challenges of a San Francisco location, and factors specific to this university, described below. The current enrollment (fall 2019) is 1,511, up from 1,449 in 2017. A small increase in overall enrollment is projected for 2020-21, continuing into 2021-22. Current data suggest that a goal of 1,520 students at the end of the current strategic plan is realistic. This goal will be offset by increased certificate options and enhanced retention.

The School of Undergraduate Studies experienced growth but did not meet projections. This is attributed to three major factors: 1) the negative impact on recruitment of an ongoing personnel issue with a faculty member who refused to return a signed contract and directed an extensive social media campaign against CIIS that targeted prospective students, practicum sites, and alumni, a major source of referral for the school; 2) a decision to slow down the development of new degree programs; and 3) the need to refresh the BA in Interdisciplinary Studies. The BA degree, first implemented 25 years ago, has been the subject of assessment by the faculty, reviewing its student success and completion data, its content and delivery, and its title in the context of contemporary higher education and the changing needs of students. SUS successfully launched an online degree in psychology; this is now in its second year. This spring the program added a hybrid model in psychology and admitted a cohort of 19 new students. CIIS intends to add new programs to this school. An evaluation of the online initiative is beginning this semester with the intent of comparing outcomes for the online and hybrid approaches. Retention and graduation have always been very strong in the hybrid Interdisciplinary Studies approach that is organized around cohort and learning community models.

The American College of Traditional Chinese Medicine (ACTCM), the university's newest school, has had a pattern of declining enrollment since 2008. The university is currently engaged in determining why and in taking corrective action. The new dean is working actively to address issues of curriculum review and alignment. Additional admissions, marketing, and administrative resources have been added in an attempt to both support and better understand the situation and its causes. Some of the decline can be attributed to the state of the field and the profession, with a local and

national oversupply of Chinese medicine institutions, and degree changes that have led to a first professional doctoral degree. The high number of units required for graduation and licensure result in an extended time to graduation with high cost for students. ACTCM will be the subject of a discussion at the February meeting of the Board Academic Affairs Committee as the university works to arrest and reverse the decline.

[Exhibit 03f: Enrollment trends 2016 - 2021](#)

CIIS has seen significant growth in advancement funding under the direction of the current vice president of institutional advancement. For FY 2018-19, fundraising was up by 36% over the prior year, with unrestricted funding up 235%. The advancement team has been increased to full staffing. The team has worked to develop a more sustainable donor mix to ensure a steady growth in donated revenue. A new constituent relationship management system (CRM), Raiser's Edge, will interface and integrate with other offices through Colleague, allowing for timely tracking and reporting. There is a new emphasis, with staffing, on cultivation of alumni, an area that is seen as key to long-term success, and on building an annual fund, now in its second year. CIIS has integrated its public-facing activities under the vice president of institutional advancement, the largest unit being Public Programs. In addition to expanded programming featuring speakers and workshops, Public Programs plans to offer more certificates, building on the success of those in Psychedelic Therapies and Research (CPTR), and Sex Therapy, which has the distinction of being one of the few programs in the nation offered by an accredited academic institution.

CPTR positions CIIS as a leader in the emerging field of psychedelic research and therapies. More than 220 students have graduated from the certificate program to date. Given the very high demand, CPTR is working with an advisory group to develop a new business model and a plan to scale up the program.

China Projects, which was seen to have major potential as a source for non-tuition revenue in 2017, has suffered from the current trade, political, and pandemic challenges between the U.S. and China. Activity continues, including current exploration of a partnership to offer an online undergraduate degree in psychology taught in Mandarin. China Projects is not on track to meet its strategic goal of \$500,000 annual revenue; revenue for this year is now projected at \$160,000.

Six counseling and two acupuncture clinics continue to provide service to the San Francisco community. CIIS provides 60,000 counseling hours yearly to underserved clients. Historically, the clinics have primarily drawn clients via word-of-mouth but advertising and improved web presence have been added in recent years.

Connection:

Expand delivery formats, increase inquiries and graduation rates

CIIS recognizes the gifts and limitations of its San Francisco location. Cost of living and affordable housing can be barriers to enrollment. The university is committed to goals of increasing access and equity and building diversity. These goals, accompanied by a desire to maintain excellence in teaching and learning, have highlighted the importance of online instruction. The university has seen success and growth in an online offering of its Philosophy, Cosmology, and Consciousness (PCC) program at both master's and doctoral levels. A recent information session for PCC drew over 20 people from a range of countries including Iran, Ireland, Spain, and Thailand, plus numerous states. Analysis of enrollment growth in the School of Consciousness and Transformation (SCT) indicates that it has primarily been in online and weekend (hybrid) programs. It is anticipated that additional SCT programs will go online in the next two years and that this will result in increased enrollment.

CIIS is evaluating the "fit" of online instruction for its successful approaches to counseling psychology and is assessing lessons from its first adopter, Expressive Arts. After review, the faculty Curriculum and Academic Review Committee (CARC) agreed to pause admission to the online module for the upcoming year to allow the program to conduct a full assessment of its challenges and successes.

There is robust faculty debate about many aspects of online instruction including the benefits of synchronous and asynchronous delivery (primarily based on access for national and international students), online presence and community, and impact on faculty workload. All CIIS courses have a web-based component as a Canvas space is created for each course.

Marketing and recruitment plans for enrollment growth and admissions and recruitment were included in detailed subsidiary plans. These were submitted to WSCUC as requested as a Progress Report, in February 2019, and were commended.

Admissions is benefitting from full implementation of Slate Technolutions, a comprehensive CRM solution that is designed specifically for higher education admissions. This has resulted in positive changes in admissions processes including time-sensitive and program-specific messaging, timely reports, and comprehensive prospect tracking. This has created more efficiency and has freed up admissions staff for more personal interaction with interested prospects. In fall 2019, the director of admissions reported a record number of applicants, more programs filling earlier with four full in May (for fall admission), five full by July, a 22% increase in number of applications, and a

10.5% increase in number of students admitted. Spring Open House attendance reached a new high at 187; fall had 163.

[Exhibit 03h: Admissions activity comparison, Fall 2018 to Fall 2019](#)

Marketing and recruitment plans are designed to maintain the core CIIS market in the San Francisco Bay Area and to drive enrollment growth from out of state and overseas, especially for online programs. In response to regional, national, and international trends and data, marketing prioritizes online and social media campaigns (the greatest source of referral remains word of mouth). There is an ongoing focus on website improvements and updates; the website is the largest and most important marketing tool.

CIIS has a history of attentiveness to student retention and graduation. Early efforts focused on time to degree and on clarifying and simplifying policies and procedures. Subsequent to that a Center for Writing and Scholarship was added to the research support provided by the Library to strengthen academic support. Most recently attention has been on extending student activities to online students and on student wellness, including group and individual counseling, movement classes (yoga, tai chi, and others), and student-led action groups. The recent focus on wellness is a reflection of how CIIS, like all of higher education, has seen increased levels of anxiety and depression among students.

Retention and graduation rates at CIIS have long been quite high in the hybrid undergraduate program and the counseling psychology programs. Rates for PhD programs have annually been disappointing and resistant to change despite intervening initiatives. Many of the PhD programs attract returning adult students seeking personal growth and are less interested in degree completion.

[Exhibit 03i: CIIS Retention and graduation](#)

There are two components to the efficiency goal: make sure that staff and faculty have the resources they need to effectively accomplish their work; and make sure that administrative costs do not overtake instructional costs. With time, we are learning more about both of these.

Since fall 2016 CIIS has invested resources in improving internet access and computer resources for faculty, staff, and students. Investment in Ellucian is the largest piece of this commitment and the implementation process is a several-year project; the finance module is the first to go-live (in winter 2020) in support of the need for accurate and accessible data for tracking costs.

As the American Council of Trustees and Alumni noted in its 2017 report, *How Much is Too Much?*, administrative cost growth relative to instructional cost growth has been one factor in

increasing the overall cost of higher education. Over the last three years, instruction and academic support cost have remained close to this goal, varying between 49% and 54%.

Diversity: Strive for diversity and inclusion (see Section 3.D.)

CIIS holds diversity, equity, and inclusion as core values. Progress towards this strategic goal is presented in detail in the following section.

D. Integration of the Diversity and Inclusion Strategic Plan and Progress Toward its Objectives (CFR 4.6)

Diversity and inclusion have long been central values at CIIS as stated as one of the Seven Commitments. The Office of Diversity and Inclusion was created as part of a presidential initiative; the former dean of diversity and inclusion was involved in the formation of the current strategic plan and also developed an ancillary plan specific to diversity and inclusion.

The graphic for the CIIS strategic plan places the goal of “Diversity: Strive for Diversity and Inclusion” at the center; this was a conscious choice and reflected institutional thinking and goals at the time the plan was created. The goal was to ensure that the lens of diversity and inclusion is applied to all decision-making and all goals. Based on the guidance of the dean of diversity and inclusion, and with this central goal in mind, objectives were defined qualitatively, not quantitatively. CIIS has added additional support for traditionally underrepresented groups within the community. In keeping with the orientation of the strategic plan, the university has attempted to ensure that initiatives include students, faculty, and staff. Current university-wide initiatives include:

- Bridge Scholars Program, offering support to first generation, traditionally underserved, international, new, and POC (People of Color) students
- Student Ambassadors for Diversity and Inclusion
- Curriculum Excellence Fellows (a faculty-led initiative for curriculum revision and diversity training)
- “Fifth Thursday” faculty workshops, run by the Faculty Diversity and Inclusion Committee, each focusing on an aspect of diversity training
- ACTCM lecture series, “Yin, Yang, and Everything in Between”: exploring approaches to gender
- Diversity and Inclusion Symposium
- Office of Diversity and Inclusion serves as advisors for student groups
- Representation on leadership groups, including Deans and Directors Council

- Collaboration with Advancement for grant writing
- PhD Bridge Scholarship Program: a three-year pilot support program for PhD students from under-represented groups (currently in year two; year one assessment included as Exhibit 3j).
- Increased diversity scholarships and inclusion of scholarships for named groups such as black men and single parents
- A Book Group for faculty and staff sponsored by the President's Office and the Office of Diversity and Inclusion. This semester's book is *How to be an Antiracist* by Ibram Kendi.
- New creation of a President's Advisory Committee on "Campus Climate, Diversity, and Inclusion" to better achieve cross-institutional collaboration and support

In addition to university-wide initiatives, strategic initiatives were developed at the school level, with faculty tasked with articulating initiatives to support a diverse student and faculty body and to ensure inclusive curricula and materials. CIIS recognizes that its next strategic plan will benefit from quantitative measures including demographic data, which was not an emphasis of the current plan.

[Exhibit 03j: PhD Bridge Scholars – year one report](#)

[Exhibit 03k: Curriculum Excellence Fellowship Project – formative assessment](#)

E. Central Role of Faculty (CFRs 3.7, 3.10)

The 2016 WSCUC reaffirmation of accreditation visiting team concluded that there was insufficient evidence of the faculty's role as integral partners in strategic planning and program development and assessment. CIIS believes that this finding resulted from limited faculty involvement in the strategic plan developed over the late spring, summer, and early fall of 2017, a time when faculty availability was limited. As was noted in the President's April 2018 letter to the WSCUC Commission, faculty had been extensively involved in the creation of the 2015 plan out of which evolved the later plan, and they were fully engaged in the operationalization of the planning document. The president also noted in that letter that CIIS faculty has "a central and significant role in the development, evaluation, and revision of programs." As is clear in the Curriculum and Academic Affairs Committee (CARC) manual, approval for a new program or the closure of a program, as well as all program review, must go through the faculty.

The central role of faculty at CIIS is assured through a faculty governance structure of standing committees, membership and participation on Board of Trustees committees (including Academic Affairs, Student Life, and Finance), a voting faculty seat on the Board, inclusion in President's Cabinet of the Faculty Council chair, and mandated faculty representation on university committees

and task forces. There are very few aspects of the university that do not include a faculty representative and perspective. Core faculty members meet monthly for a 90-minute duration Faculty Council; agendas for these meetings are developed by the Faculty Executive Committee, which is chaired by the Faculty Council chair and is comprised of the chairs of all standing faculty governance committees. Faculty Council uses a Canvas space for discussion of potential policy or procedure changes. Recent examples have included discussion of criteria for scholarship and a policy on bringing children to classes.

Development, evaluation, revision, and closure of programs cannot take place without faculty discussion and approval. The Curriculum and Academic Review Committee (CARC) has responsibility for evaluation of proposals for any new programs or academic certificates, proposed modifications of current programs (e.g. a proposal to take the program online), or closure of programs. Its work is guided by the Faculty Handbook and by an operating manual that is regularly reviewed and updated as needed. The provost sits on CARC.

CARC may take items to the full Faculty Council for input and discussion. It recommends actions to the provost, who then makes recommendations to the president. CARC recommendations are then taken to the Academic Affairs Committee of the Board for a final determination, which, in turn, is reported out to the full Board. The chair of CARC is a standing member of the Board Academic Affairs Committee; the committee has two additional faculty members, and the provost is the staff liaison, ensuring that the faculty perspective is directly represented for all deliberations. Over 20 faculty members have been invited to participate in the trustees' upcoming "Integral Futures" strategic retreat.

[Exhibit 031: CARC manual](#)

SECTION 4

Identification of Other Changes the Institution is Facing

As stated earlier, CIIS is in a constant process of adapting to changes within the institution, within the field of higher education, and as a result of regional, national, and international shifts.

As it looks to the future, CIIS has identified the following major changes that will be major areas requiring attention:

1. **Leadership Transition.** As described in Section Three, the current president, Dr. Judie Wexler, has announced her intention to retire in June 2021. The Board of Trustees, the group responsible for a presidential search and transition, has begun preliminary work with AGB

Search (the Association of Governing Boards) and will ramp up the search process in spring of 2020. Dr. Wexler has been with CIIS for over 17 years and has ably led the institution out of crisis into current stability. Any transition of president is a major event for a university; given Dr. Wexler's positive and lengthy history with CIIS, the university is aware that this will be a very significant transformation in its immediate future.

2. **Status of adjunct faculty.** Like most of higher education, CIIS relies on a pool of adjunct instructors to augment and deliver its programs. Based on changes in California law, and in anticipation of more changes to come, CIIS has proactively moved all adjuncts (and similar categories of employees) from the traditional payment by unit of work to hourly employees. California law AB 5 has also required that all individual clinical supervisors for counseling and psychology students be moved from independent contract status to hourly employees. Spring semester 2020 has seen the first implementation of these significant changes in institutional culture. They were implemented with an accompanying increase in adjunct compensation and plans to provide ongoing communication, training, and professional development for adjuncts.
3. **Building and Location.** CIIS purchased its current building in 2007. Since that time, the area has undergone unprecedented revitalization resulting in a dramatic increase in the worth of the building with an estimated value of \$65m on a mortgage of \$12.605m. This equity, plus the potential cost to improve building functionality; the reality of the impact on students, faculty, and staff of the cost of living in San Francisco; and the challenge of commuting; has led to an analysis of the current location and future needs. The president has assembled a team of advisors from the various campus constituencies to address the possibility of moving within San Francisco or to Oakland in order to have a fully up-to-date building with less debt and no deferred maintenance.

SECTION 5

Concluding Statement

In the three and a half years since the WSCUC 2016 comprehensive visit, CIIS has focused strategic attention on strengthening its finances and infrastructure to ensure a solid foundation to meet its mission and goals. Actions have been taken to build revenue, to add to reserves, and to control expenditures while also upgrading technology and modestly improving salaries. CIIS has improved efficiency, focused on student connection and satisfaction, and reviewed strategic goals to ensure alignment with mission and values. The refinance of the Mission building additionally enabled

consolidation and reduction in debt and interest rates, and provided the resources needed to adopt a new integrated information system and to address a significant deferred maintenance issue.

The CIIS community is justifiably proud of the significant progress the university has made in a short period of time and recognizes that there are real issues and questions to address for the future. CIIS is currently led by a competent team of president, provost, associate provost, vice presidents, deans, and directors, who are all working with an active faculty governance system and Board of Trustees. The current strategic plan emphasizes building revenue, increasing connection, enhancing efficiency, and striving for diversity and inclusion. These goals will continue to be central to CIIS as it moves into the future and as new strategic initiatives are created to strengthen them.

For 51 years CIIS has set for itself big goals as it has strived to create an integral education. WSCUC has provided important grounding in support of this large vision. The concerns raised by WSCUC through processes of Warning and Concern have been, and will continue to be, acknowledged and addressed. The review necessary for this Special Report helped in taking stock of the enormous progress made. It also highlighted gaps and work that is still to be done. CIIS leadership is aware of the need for a proactive and flexible approach to strategic planning as it navigates a rapidly changing field of higher education from its location in a world-renowned, high-cost city. Leadership recognizes that planning has to be iterative and is taking steps to institutionalize that in the Board's "Integral futures" retreat. CIIS is mindful that it is entering the final year of its current strategic plan and that its focus needs to shift to developing the foundation for the next planning cycle as it positively engages in a leadership transition.

The university continues to make an important contribution to higher education and to the wider community through its academic work, public programs, and community clinics. Its work in healing and human well-being is very much aligned with contemporary and future needs. Its core values are as important and relevant today as they were at its founding, if not more so. CIIS produces innovative, resourceful, and creative graduates who are instilled with a passion for making a difference and acquire the skills and knowledge needed to thrive in an uncertain, rapidly changing world.

CIIS thanks the Special Visit Team and the Commission for the support that it provides. The cycle of reports and visits has undoubtedly enhanced the motivation to address challenges and concerns in a timely and proactive manner.

List of Exhibits

- 01a: [CIIS Mission, Purpose, and Seven Commitments](#)
- 01b: [CIIS schools, programs, and degrees](#)
- 01c: [Enrollment 2015-2019](#)
- 01d: [Recent WSCUC communications and actions](#)
- 03a: [Financial indicators \(revenue, expense, composite scores\)](#)
- 03b: [Non-tuition revenue 2017-2019](#)
- 03c: [Business debt schedule](#)
- 03d: [Unrestricted net assets and expendable resources](#)
- 03e: [Strategic plan 2018-2021](#)
- 03f: [Enrollment trends 2016-2021](#)
- 03g: [Advancement report – February 2020](#)
- 03h: [Admissions activity comparison, Fall 2018 to Fall 2019](#)
- 03i: [CIIS Retention and graduation](#)
- 03j: [PhD Bridge Scholars – year one assessment](#)
- 03k: [Curriculum Excellence Fellowship Project – formative assessment](#)
- 03l: [CARC manual](#)