

RESPONSE TO THE RESOLUTION OF NO CONFIDENCE

WHEREAS: faculty, staff and administrators at California State University, San Bernardino (CSUSB) share an abiding commitment to maintain an educational environment where student learning is central to the mission of the university; and

WHEREAS: within three years of the appointment of President Tomás Morales, in response to a **decline in shared decision making**, a **marked turnover in the senior administration**, and a **perceptible change in campus climate**, the Faculty Senate commissioned a climate survey at CSUSB; and

RESPONSE

Decline in Shared Decision Making: With over 40 years of higher education experience, President Morales values the importance and expectations surrounding a shared governance culture in all of its manifestations (faculty, staff and students). Pre-dating President Morales, the Provost had long been the President's designee to CSUSB's Faculty Senate Executive Committee (FSEC), but Dr. Morales did attend over 70 percent of the full Faculty Senate (FS) meetings in his five years on campus, providing oral reports to all in attendance.

Leadership is actively engaged with every campus constituency (Faculty Senate, academic and administrative departments, student government) on the development, planning and processes associated with university initiatives, including the multiple implementations of the Strategic Plan (Faculty Center for Excellence, Staff Professional Development, Student Success, Branding & Identity, etc.), Campus Master Plan, Collegiality Committee, Q2S, University Budget Advisory Committee, and the Graduation Initiative 2025. A handful of faculty participation examples include:

Strategic Plan 2015-2020: Co-Chair Terry Rizzo (FS), Student Success Co-Chair Jodie Ullman (Past FS Chair, FSEC), Faculty Staff Success Co-Chair Monty Van Wart, Resource Sustainability and Expansion Co-Chair Stuart Sumida, Community Engagement and Partnerships Co-Chair Cherstin Lyon, Identity Co-Chair Astrid Sheil.

Campus Master Plan: Co-Chair Jeff Thompson, Dorothy Chen Maynard (FS), Todd Jennings, Jake Zhu, Michael Salvador and Eric Newman.

50th Anniversary: Co-Chair Jodie Ullman (Past FS Chair, FSEC)

Graduation Initiative 2025 Steering Committee: Karen Kolehmainen (FS Chair, FSEC), Ryan Keating (FS), Kim Costino and Davida Fischman (FS).

University Budget Advisory Committee: Andrew Bodman (FSEC), Mary Boland (FSEC), Haakon Brown (FS Vice Chair, FSEC) and Karen Kolehmainen (FS Chair, FSEC)

Quarters to Semesters Conversion (Q2S): Director, Kim Costino (approved by FS)

Collegiality Committee: Tri-Chair Karen Kolehmainen (FS Chair, FSEC)

University Branding Initiative: Co-Chair Victoria Seitz, Haakon Brown (FS Vice Chair, FSEC), Stuart Sumida.

In addition, each of our constituency leadership teams (Faculty Senate and ASI Student Government) provide recommendations and exclusively nominate individuals to serve on the University Enterprises Corporation Board of Directors, CSUSB Philanthropic Foundation Board of Directors, Associated Students Inc. Board of Directors, as well as search committees for all senior management positions. The Chair of the Faculty Senate is also a voting member of the Administrative Council, serving as the Senate's voice on the development and approval of all campus policies.

Marked Turnover in the Senior Administration: Presidents traditionally have every opportunity to build their senior leadership team, but some positions required greater urgency. Upon the President's arrival in August 2012, CSUSB had an interim VP for University Advancement (two-year contract expired) and an interim VP for Information Technology. Five months later (January 2013), the long-time VP for Student Affairs announced his pending retirement in July 2013. By August 2013, three national searches were completed, resulting in new permanent Vice Presidents for University Advancement, Student Affairs and Information Technology Services were in place. The Faculty Senate played an active role in all three search processes and offered no negative feedback in consultation on the needs to fill these positions nor any concerns about the change in leadership.

In March 2014, the VP for Administration and Finance announced his intent to retire. After another national search, the position was filled four months later. As with the other positions, there was no concerns raised by the Senate during consultation or participation on the search committees.

From 2012 to 2015, the Senate rarely questioned the President on university initiatives. In June 2015, Dr. Andrew Bodman's role as Provost ended. In the days that followed, the FS passed three resolutions, including a call for the reinstatement and retention of Dr. Bodman (June 16), a resolution of rebuke for President Morales for a remarkable lack of respect (June 26), and a resolution to request Chancellor White for assessing and addressing potential issues in campus climate (June 29).

Perceptible Change in Campus Climate: Up until June 2015, campus climate was never identified as a problem by the FSEC or any other campus constituent. But in 2010 (two years before President Morales' arrival), the Chancellor's Office conducted a campus climate survey. A current Executive Committee member and author of the 2015 survey (Jan Kottke) conducted further analysis on the 2010 results and specifically identified cronyism, favoritism and discrimination as issues by those who participated in the survey, a window of time that predates the President's arrival on campus by two years.

WHEREAS: the results of the **campus climate survey**, with more than 750 faculty, staff, and administrators responding, revealed that over two-thirds of the respondents indicated the climate had changed, and 89% of those individuals stated that the climate had become worse; and

RESPONSE

Campus Climate Survey: In the fall of 2015, the FSEC asked select faculty to independently conduct a campus climate survey. Students were intentionally omitted. But former staff and administrators that had left the university from 2012-15 were included. Comments built into the two reports were only negative. When the Office of the President repeatedly asked for copies of the raw redacted data, the FSEC refused. The 2015 survey made no reference to the 2010 Chancellor's Office survey.

WHEREAS: the results indicated that an **atmosphere of toxicity, fear and distrust** of the central administration has developed among CSUSB faculty, administrators, and staff during his tenure, with numerous reports of bullying, favoritism and retaliation; and

RESPONSE

Atmosphere of toxicity, fear and distrust: Mining down and having meaningful conversations with faculty and staff has been a priority. The President and Vice Presidents were ultimately compelled to learn as much as they could about the challenges our community is experiencing in advancing our academic mission,

touching virtually every area of campus. Along the way, the team was also delighted to hear just as many stories about why faculty and staff enjoy working at CSUSB, particularly their relationships with our students and each other as colleagues.

Provost McMahan, Interim Provost Delgado and President Morales personally hosted 38 different meetings, including 25 general faculty groups, nine with department chairs, and four with principle investigators. A total of 195 faculty members participated.

The President also held 36 meetings with 70 departments, connecting with 604 total staff in their respective offices and including all categories of staff; meetings will continue to be held through 2017 and beyond. In addition to the meetings the President held, the Vice Presidents scheduled a series of meetings with each staff member of their respective divisions.

Despite starting last summer, Provost McMahan has been fully engaged in these conversations, taking a personal approach. She has already met with every department chair (in small groups).

Through this meaningful discourse, it was discovered that the feedback fell into five primary topics, which were included in a message to the university community in January 2017:

Professional Growth and Development

Many faculty and staff expressed a desire to grow professionally. This also came up when the Cabinet met with the FSEC in Spring 2016. When new hires came to CSUSB from other organizations, there was, in some cases, disappointment stemming from a perception that long-time employees of the campus were overlooked. As we reviewed appointments made over the past four and a half years, the data shows that, in fact, long-time faculty and staff have been appointed to multiple new positions or promotions throughout the campus community.

From June 1, 2012 to September 30, 2016, we have filled 593 staff and management positions (both replacement and new). University employees were selected in 201 of these appointments, or roughly 34%. This percentage would exceed the national average of 28% in 2013. Integrating new members to the community with longer term staff strengthens the overall work environment.

The Faculty Center for Excellence Committee has been working diligently to develop a comprehensive Center for Faculty Excellence that allows for interdisciplinary collaboration and enhanced support for scholarship, research, and pedagogical innovation. The Committee has also created a vision statement and organizational chart and has been working collectively across all disciplines.

After a difficult recession, CSUSB has made a remarkable commitment to faculty professional development. The university has committed more than \$6.6 million in support of faculty professional development since Fall 2012. In fact, the \$1.9 million spent on faculty professional development in 2015-16 was the highest number in more than six years. The campus also continues to support all levels of scholarly activities. Just last year (2015-16), we dedicated \$7.75 million to fund faculty reassigned time, resulting in only 8% of our full-time tenure/tenure-track faculty teaching full quarter loads. Funding also provided travel dollars to increase the number of faculty who could attend professional conferences.

Staff/administrative team members have been part of that equation as we dedicated slightly more than \$6.1 million since Fall 2012 to strengthen professional development opportunities and gain new skill sets to support promotional opportunities. In the fall, after a national search, we hired Rowena Casis-Woidyla, a CSUSB experienced HR leader, as the inaugural Director of Leadership Development and Employee Enrichment, charged with strengthening our growing number of professional development training opportunities. CSUSB is prepared to invest in career advising and advance support of professional development opportunities in every division and college.

When you factor in travel, CSUSB has committed more than \$18 million since Fall 2012 in professional development for faculty, staff and administrators.

The creation and implementation of CSUSB's inaugural staff development center and training plan is progressing. Over the last year, several deliverables were accomplished, including:

- a. Established a 12-member University Committee;
- b. Scheduled five open forum sessions "Let's Talk Staff Development Center" taking place from 2/17 – 2/24, including one at the Palm Desert Campus;

- c. Secured a dedicated email address (staffdevelopmentcenter@csusb.edu) for future communication; and
- d. Human Resources has partnered with the Chancellor's Office Systemwide Professional Development office to pilot a supervisory workshop and also participated in the 2016 Fall Vendor Fair for the purpose of soliciting employee feedback regarding initial thoughts on the staff development center.

The university community can look forward to the opening of both centers this fall (2017).

WHEREAS: one year after the release of the climate survey findings, despite initially promising that all of the survey's recommendations would be implemented, the President has failed to address the bulk of the recommendations for improving campus climate, including the development of an anti-bullying policy and an audit of the Human Resources department; and

RESPONSE

Failed to address the bulk of the recommendations for improving campus climate:

In addition to the two recommendations discussed below, the campus climate survey also made recommendations for the senior leaders to re-establish trust, listen to all employees, model integrity, demonstrate that all employees are valued, reduce the climate of fear and favoritism, invite safe input before decisions have been made, work more closely with constituents, conduct a workload audit, commit to an ongoing process of data collection to evaluate campus climate over time, and bring in an executive coach who specializes in authentic, ethical and relational leadership.

As described above, President Morales and the entire cabinet responded to the climate study and many of these areas are being addressed. The President changed the university's impartial and confidential Ombuds from a historically part-time position to a full-time person supporting the important role of creating a safe place for faculty, staff and students to express concerns. A three-year cycle of 360 degree reviews was initiated to bolster the administrator assessment process via cohorts, so ultimately every management position will be reviewed with these broad assessments once every three years. The President has had personal conversations with over 1,000 faculty, staff and students. He will continue to meet with staff over the summer and beyond, with a focus on College staff. Additionally, all the Vice Presidents have initiated staff meetings within their divisions, including the Provost's meetings with every department chair. These

are just a few examples of what has been done to address the recommendations from the climate survey.

Anti-bullying policy: As discussed with the FSEC on May 17, 2017, senior leaders reached out to the Chancellor's Office regarding establishing an anti-bullying policy and were told that this policy would have to come from the Chancellor's Office instead of the individual campuses. Despite this, CSUSB established in the summer of 2016, a comprehensive continuing education program focused on microaggressions. Additionally, the Committee on Collegiality and Respect, tri-chaired by Provost McMahan, FS Chair Dr. Kolehmainen and outgoing ASI President Alex Gutierrez, was formed and is defining what it means to have, maintain, and promote a climate of collegiality and respect. The Committee planned a collegiality forum featuring leading expert and guest facilitator Dr. Kathy Obear for a vibrant and interactive discussion of ideas on how to improve collegial discourse and working relationships across campus. Although this forum was scheduled for May 11, 2017, it had to be postponed due to the memorial service for President Emeritus Karnig and is rescheduled for Fall 2017.

Audit of Human Resources Department: Three years ago, the Office of the Vice President of Administration and Finance and the Office of the Provost co-contracted with consultants to complete an independent analysis of the Office of Human Resources as well as the Office of Academic Personnel. In Fall 2016, the same consultant was available to repeat the HR analysis and a new consultant reviewed Academic Personnel. Both were contracted to conduct program reviews and complete a follow-up analysis on progress towards the identified goals in 2013. The firms have completed their respective program reviews and we expect the finalized reports to come out soon.

WHEREAS: President Morales continues to be unwilling to acknowledge the severity of the problems of fear and distrust among employees; and

RESPONSE

Again, the Vice Presidents and President have met with campus constituents as discussed above. The findings from staff feedback meetings were vetted through two summer 2016 retreats, one with senior leadership and one with middle managers. The complete findings were organized into specific categories; what is working, what needs improvement, and what staff must contribute, were shared with each division. Staff feedback meetings continue and the new recommendations are used to advance evaluation on ways to improve.

WHEREAS: President Morales has **abandoned long-standing shared governance practices, declining to consult with established Faculty Senate committees** before making decisions, **refusing multiple invitations from the Faculty Senate Executive Committee** for meetings, discontinuing the practice of holding scheduled quarterly **open meetings with faculty, neglecting to provide useful information** in his reports to the faculty, and **failing to involve the university community in key decisions**; and

RESPONSE

Abandonment of shared governance practices: This has already been addressed in the first section of the first response.

Declination of consulting with Faculty Senate committees: The President and entire senior leadership team have been practicing the highest level of engagement with the FS, in many ways going above and beyond in levels of consultation that has frankly been ignored.

Refusal of meeting with the FSEC: The Cabinet and President have accommodated schedules to meet with the FSEC, including February 14 and May 17, 2017. Although this latter meeting had been scheduled since March 10th, only 4 Executive Committee members were present. The President has also committed to joining the weekly meetings with the Provost and FSEC beginning in Fall 2017.

Quarterly Open Faculty Meetings: At the joint FSEC meeting on May 17, 2017, the President committed to having these open faculty meetings, beginning Fall 2017. This commitment was reiterated at the May 30th FS meeting.

Providing useless information in reports: Faculty Senate reports are given by the President and the Vice Presidents at every Faculty Senate meeting. They highlight accomplishments and important initiatives. The reports can be found in the Senate meeting minutes, housed at <http://senate.csusb.edu/minutes.html>.

Failing to involve university community in key decisions: Leadership is actively engaged with every campus constituency (Faculty Senate, academic and administrative departments, student government) on the development, planning and processes associated with university initiatives, including the multiple implementations of the Strategic Plan (Faculty Center for Excellence, Staff Professional Development, Student Success, Branding & Identity, etc.), Collegiality Committee, Campus Master Plan, Q2S, University Budget Advisory Committee, and the Graduation Initiative 2025. Additionally, each of our constituency leadership teams, namely the Faculty Senate and ASI Student

Government, provide recommendations and exclusively nominate individuals to serve on the University Enterprises Corporation Board of Directors, CSUSB Philanthropic Foundation Board of Directors, ASI Board of Directors, as well as search committees for all senior management positions. The chair of the Faculty Senate is also a voting member of the Administrative Council, serving as the Senate's voice on the development and approval of all campus policies.

As a specific example, the detail of budget allocations, down to individual expense items at the division and college level occurs at the University Budget Advisory Council (UBAC). UBAC representatives include multiple senior faculty leaders, members from every division, and student leaders. UBAC is now meeting nearly three times as often as any time in its history and many of the members report that the quantity and detail of information shared is far beyond anything ever presented by prior administrations. Proposed new expenditures are discussed with UBAC, and the opportunity is provided to comment on these proposals and/or to suggest differing perspectives.

WHEREAS: the lack of shared governance has resulted in an erosion of the centrality of **Academic Affairs**, the division most critical to fulfilling the mission of the university, through a consistent decline in its share of the **base budget** and a **failure to hire sufficient tenure track faculty** to meet key university targets set by the current administration; and

RESPONSE

Declining Academic Affairs' base budget: Although allocations to the divisions change over time due to the movement of programs and departments from one division to another, such as the consolidation of IT personnel from non-academic divisions moving to ITS and Athletics moving from Administration and Finance to Student Affairs, the data does not support concerns that the financial commitment to Academic Affairs has been reduced over time. Allocations to Academic Affairs appear to be on-par with 2010-11. It should be noted that Academic Affairs experienced slight increases in 2011-12 and 2012-13, mostly due to the campus decision to reduce the impact to that division during the recession years. It would seem intuitive that this balance would shift back to equilibrium during the recovery years.

In fact, CSUSB has committed more than \$6.6 million in support of faculty professional development since Fall 2012. We also continue to support all levels of scholarly activities; just in 2015-16 alone, we dedicated \$7.75 million to fund faculty reassigned time, resulting in only 8% of our full-time tenure/tenure-track faculty teaching full quarter loads. Funding also provided travel dollars to increase the number of faculty who could attend professional conferences.

Failure to hire sufficient tenure track faculty: CSUSB tenure-track hires have been steadily increasing, up 140 hires since 2012 and resulting in 28 net new faculty scholars. We have authorized at least 30 searches, expecting eight net-new faculty for 2018-19.

WHEREAS: **key elements of the strategic plan are already failing as a result**, with the administration not willing to make concrete plans to achieve the targets it made to **reduce the student-faculty ratio** and to **increase the proportion of tenure track faculty**, both critical to assuring student learning and progress towards graduation; and

RESPONSE

Strategic Planning Progress: CSUSB is in the second year of a 5-year Strategic Plan. Significant progress was made in Year 1, including the initiation of a Faculty Center of Excellence, Staff Development Center, and the launch of a \$50 million comprehensive campaign of which we've just reached over 78% of our goal. This was memorialized in the progress report (<https://www.csusb.edu/strategic-plan/our-process/progress-report>). The progress report for Year 2 is currently being written.

Reducing the student-faculty ratio: Our 2012 SFR and 2015 SFR are the same (28.1) and rank near or at the bottom in comparison to system-wide data. Our FTES and FTEF growth rates are nearly identical.

Increasing tenure track faculty: As discussed above, CSUSB tenure-track hires have been steadily increasing, up 140 since 2012. Our campus has increased in our system wide placement from 13th in 2012 to 9th in 2016. System statistics show that our tenure-track density is above the CSU average despite being near the bottom of funding per FTE.

WHEREAS: the leading indicators of **student success**, particularly first year student retention, have declined steadily since 2012, and enrollment has been so poorly managed that the President now talks about the need to **“suppress” CSUSB’s enrollment**; and

RESPONSE

Student success: The Senate’s statement largely ignores the complexity of student success and enrollment management. We know that student success has several leading indicators, including 2nd, 3rd and 4th year retention. It is correct that retention into the 2nd year is at 85% but there is a recognized amount of unexplained variation in a sample or usual variation in the data. In other words, we need to see continued decrease in retention rate in order to draw any

serious conclusions. There was a similar trend 2005, 2006 and 2007.

Another indicator of student success is graduation rate, 4-years, 5-years, and 6-years, which includes a general upward trend. The one piece of data from this current administration is the Fall 2012 data, which shows an increased 4-year graduation rate (10% to 12%). Mean unit load has been increasing over time which is another indicator of student success.

The reference to “**suppress**” **enrollment** came from the campus open forums on the state budget, where stakeholders were informed that the Governor’s current budget provided for 0% enrollment growth, despite serving a region where demand for higher education grows every day.

WHEREAS: there has been an unusually **high level of turnover in the CSUSB senior administration** since President Morales' arrival on campus, as highly regarded longstanding administrators have been fired or asked to resign, resulting in a loss of institutional memory and a weakened understanding of CSUSB’s rootedness in our service area; and

RESPONSE

This was detailed out on page two under: **Marked Turnover in the Senior Administration**.

WHEREAS: President Morales has exhibited **cronyism and favoritism in his appointment of interim administrators** and by offering a post-retirement position to **former Cal Poly Pomona President Ortiz**; and

RESPONSE

Cronyism and favoritism in interim administrators: This claim is especially offensive to the values and mission of CSUSB. Part of the President’s responsibilities is to facilitate short-term interim administrative appointments until a formal search can be completed. To suggest that their appointments were based on anything other than their merit and qualifications only disparages our colleagues.

Dr. Ortiz’ post-retirement position: Dr. Ortiz has faculty retreat rights to Cal Poly Pomona and as such, under the Unit 3 Collective Bargaining Agreement, he has the benefit of exercising his right to participate in the Faculty Early Retirement Program. He has expressed his desire to complete his FERP appointment at the CSUSB Palm Desert Campus. This assignment will provide a remarkable opportunity for CSUSB students to be mentored by one of the most recognized

Latino education leaders in the country as well as help reflect the demographics of the PDC, currently comprised of 63% Hispanic students while only 11.8% of tenure track faculty are Latinos.

WHEREAS: a majority of all faculty, staff, and administrator respondents to the campus climate survey have lost confidence in the campus leadership, believe that it is not open to receiving feedback, has not communicated a clear direction, and does not act with honesty and integrity; therefore, be it

RESPONSE

These areas have been discussed above.