



OFFICE OF THE BOARD OF TRUSTEES

## Public Meeting Notice

October 8, 2015

TO: Southern Oregon University Board of Trustees, Academic and Student Affairs Committee

FROM: Sabrina Prud'homme, University Board Secretary

RE: Notice of Regular Committee Meeting

The Academic and Student Affairs Committee of the Southern Oregon University (SOU) Board of Trustees will hold a regular committee meeting on the date and at the location set forth below.

Topics of the meeting will include: SOU's curriculum approval process (action); SOU – KCC/RCC faculty/staff rates (action); review and discussion of the Institutional Review Report and the HECC Conditions Report. Other topics include a report from the Provost on a Director's Council retreat, an enrollment update, and the five-point framework for the upcoming academic year.

The meeting will occur as follows:

Thursday, October 15, 2015

1:30 p.m. to 3:30 p.m. (or until business concludes)

Hannon Library, DeBoer Boardroom, 3<sup>rd</sup> Floor (Room 303)

The Hannon Library is located at 1290 Ashland Street, on the campus of Southern Oregon University. **If special accommodations are required, please contact Kathy Park at (541) 552-8055 at least 72 hours in advance.**



**Board of Trustees**  
**Academic and Student Affairs Committee Meeting**  
**October 15, 2015**

# Call to Order and Preliminary Business



**Board of Trustees  
Academic and Student Affairs Committee Meeting**

**Thursday, October 15, 2015  
1:30 p.m. – 3:30 p.m. (or until business concludes)  
DeBoer Room, Hannon Library**

**AGENDA**

Persons wishing to participate during the public comment period shall sign up at the meeting. Please note: times are approximate and items may be taken out of order.

- |           |          |   |  |
|-----------|----------|---|--|
|           | <b>1</b> | <b>Call to Order and Preliminary Business</b>   | Chair Sayre  |
|           | 1.1      | Welcome and opening remarks   |  |
|           | 1.2      | Agenda review   |  |
|           | 1.3      | Roll call   | Sabrina Prud'homme,<br>SOU, Board Secretary  |
|           | 1.4      | Consent agenda: Approval of September 17, 2015 meeting minutes (Action)                     | Chair Sayre  |
|           | <b>2</b> | <b>Public Comment</b>   |  |
| ~ 20 min. | <b>3</b> | <b>Provost's Report</b>   | Dr. Susan Walsh, SOU,<br>Provost and Vice<br>President for Academic<br>and Student Affairs |
|           | 3.1      | Director's Council Retreat Update   | Susan Walsh  |
|           | 3.2      | Enrollment Update   | Chris Stanek, SOU,<br>Director of Institutional<br>Research                                |
|           | 3.3      | Provost's Five-Point Framework for Academic Year 2015-2016                                  | Susan Walsh  |
| ~10 min.  | <b>4</b> | <b>Curriculum Approval Process (Action)</b>   | Chair Sayre  |
| ~40 min.  | <b>5</b> | <b>SOU – Klamath Community College/Rogue Community College Faculty/Staff Rates (Action)</b> | Chair Sayre  |

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Academic and Student Affairs Committee Meeting**

**Thursday, October 15, 2015  
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**AGENDA (Cont'd)**

- |           |          |  |             |
|-----------|----------|--|-------------|
| ~ 35 min. | <b>6</b> | <b>Review and Discussion of Institutional<br/>Review Report and HECC Conditions Report</b> | Chair Sayre |
|           | <b>7</b> | <b>Adjourn</b>   | Chair Sayre |



**Board of Trustees  
Academic and Student Affairs Committee Meeting**

**Thursday, September 17, 2015  
1:00 p.m. – 3:00 p.m. (or until business concludes)  
DeBoer Room, Hannon Library**

**MINUTES**

**Call to Order and Preliminary Business**

Committee Chair, Teresa Sayre, called the meeting to order at 1:01 p.m.

**Roll Call**

The following committee members were present and a quorum was established: Teresa Sayre, Sheri Bodager, Judy Shih, Joanna Steinman, and Steve Vincent.

The following committee members were absent: Les AuCoin and Shea Washington.

The following trustees were also present: Roy Saigo (ex officio), April Sevcik, and Dennis Slattery.

Other meeting guests included: Ryan Brown, Head of Community and Media Relations; Jason Catz, General Counsel; Liz Shelby, Chief of Staff and Director of Government Relations; Sabrina Prud'homme, University Board Secretary; Dr. Susan Walsh, Provost and Vice President for Academic and Student Affairs; Don Hill, Classroom and Media Services Manager; Craig Morris, Vice President for Finance and Administration; Taylor Burke, Director of the Office of Student Support and Intervention; Chris Stanek, Director of Institutional Research; Mark Denney, Assistant Vice President for Budget and Planning; Marjorie Trueblood-Gamble, Director of Diversity and Inclusion; Kathy Park, Executive Assistant; Treasa Sprague, Administrative Services Coordinator; David Coburn, Oregon Student Association; Emily Pfeiffer, ASSOU; Brian Sorenson, ASSOU; Marianne Golding; APSOU; Alex Mesadieu; Megan Mercier, ASSOU; and Olena Black, League of Women Voters.

**Public Comment**

No public comment was made.

**Consent Agenda**

There were no changes or corrections to the minutes from the July 17, 2015 meeting. Trustee Vincent moved to approve the minutes; Trustee Steinman seconded the motion. The motion passed.

**Provost's Report**

Dr. Susan Walsh gave a brief report on the American Association of State Colleges and Universities (AASCU) meeting. Several representatives from SOU attended the July conference in Portland. There were many concurrent sessions. Dr. Walsh and Dr. Karen Stone presented two well-received briefings: one was on the university's new structure and they were invited to

return to present “lessons learned.” They also provided a “lessons learned” presentation on SOU’s House experience, which was first shared two years ago. Trustee Slattery was among the group of SOU attendees.

## **Introduction to the Office of Student Support and Intervention**

Taylor Burke, Director of Student Support and Intervention (SSI), gave an overview of the SSI mission, program and team. Significant areas of attention for the SSI office are: student intervention and case management; community standards and student conduct; confidential advising; and Title IX. She explained their student-centered approach and sources for incoming reports of concern.

She also discussed the SOU Cares Report and common interventions for the SSI office. Ms. Burke described faculty and staff as very engaged in submitting Cares reports and successful implementation showed that Cares reporting had a 67 percent increase in the last year, while the number of conduct cases remained fairly steady.

Campus Choice was described as part of SSI’s approach to Title IX. It is modeled on the You Have Options program and was developed collaboratively with the Ashland Police Department (APD). Angela Fleischer in the SSI office has been the primary and motivating factor in the program. This program has garnered national attention, served as a model for legislation sponsored by Senator McCaskill, and Ms. Fleischer continues to coordinate with higher education institutions as well as the state governor’s office and the attorney general’s sexual assault task force in Oregon. The Office of SSI has a survivor-centered approach that is trauma-informed. SOU is the only higher education institution the SSI office is aware of that uses a forensic, experiential, trauma-informed interviewing practice—meaning that victims may be unable to give a linear description of events and this interviewing practice allows them to get information from victims in the same manner it is stored in their memories. The program is Title IX compliant, has confidential advising, and partners with the APD and community response agencies.

Much discussion ensued around the topic. Responding to questions by Trustee Shih, and later Chair Sayre, Ms. Burke described how they train student leaders (including those in housing), faculty and staff so that individuals know how and where to refer a person. She cited information on the Student Life tab on the web, including the report form. She explained that the office is always broadening the methods used to educate students and improve access to this information. Marjorie Trueblood-Gamble added that faculty are encouraged to talk about SOU’s culture of reporting and protecting students in their classes, and to mention the program on their syllabi using language the provost’s office has developed.

Trustee Shih asked if the increase in reported cases was due to increased faculty involvement and Ms. Burke said it was. Jason Catz described the success and utility of the program. He further stated that the rising number of reports of Title IX cases is positive because it means the institution is not ignoring problems. Having used the program, Trustee Slattery commented that the program has actually saved lives, and that an increase in the number shows that the process works.

Trustee Vincent inquired as to whether the program mitigates the risk of incidents on campus. Ms. Burke believed SOU is minimizing risk and Mr. Catz stated the program mitigates legal risk

as well. In his three years at SOU, Mr. Catz has not had a single law suit that resulted from an incident handled by the SSI. He added that it reduces regulatory risk from the government and governmental feedback has been that the process is good, thorough, and thoughtful.

Trustee Vincent asked if there was retention tracking on the students who seek the office's services. Ms. Burke said they do not track retention in these cases because sometimes their job is to not retain certain students. Chair Sayre later added that she understood the reasons for not tracking retention of certain students, but asked if they might be able to track data for students who are referred for academic reasons. Ms. Burke indicated it could be a source for compiling information.

Trustee Sevcik asked for details on how the SSI office interacts with students' families. Ms. Burke said they do it "carefully." They handle each case based on its individual facts, whether they have a FERPA release, whether it is an emergency or a nonemergency case, whether the student wants them to engage with the family, and balance the factors involved. They want families to be involved directly and love to have them as partners. The more people the students have in their support system, the more likely they are to succeed. However, they must be cautious of FERPA and they encourage families to have these conversations. Without a FERPA release, they are extremely limited in the private information they can share with families, which Mr. Catz echoed.

Dr. Walsh invited Ms. Burke to address the committee at this point in time because the start of school is one of the peak points for the SSI office. Dr. Walsh is grateful for the work of Ms. Burke, Ms. Trueblood-Gamble, and others on Title IX cases, SOU Cares, and SSI cases. Ms. Burke has led the effort along with her colleagues and Dr. Walsh publicly thanked her for that leadership. Mr. Catz said that Ms. Burke has created a great program that is considered a national model.

### **Academic Calendar Review**

Dr. Walsh discussed the academic calendar and highlighted upcoming welcome events to kick-off the fall term. She then talked about how quickly things move during 10-week academic quarters rather than 15-week semesters.

Dr. Walsh described and encouraged attendance at the Faculty Senate governing body's meetings, which take place every other Monday evening, from 4:00 pm to 5:30 pm. Trustee Vincent asked how many usually attend these meetings and Dr. Saigo estimated that about 30 faculty members are on the Faculty Senate. Dr. Walsh also described the function, composition, and purpose of the University Planning Board, a faculty and staff committee which oversees decisions at the university level about facilities, budget items, and certain policies.

### **Enrollment Update**

Chris Stanek covered the weekly enrollment reports. He reviewed full time equivalent (FTE) targets established in retrenchment and noted their progress to goal. Mr. Stanek discussed student credit hours, undergraduates and graduates, noting that numbers will continue to adjust in the first few weeks of school.

He explained that the state's funding model changed from an enrollment based model to one of completion (degrees conferred) and enrollment. The first year of the new model is a 20 to 80



percent split between degrees conferred and enrollment; the next year will be a 40 to 60 percent split; then a 60 to 40 percent split for allocation of money.

Mr. Stanek noted increases in diversity, international students and “return after absence” students. Trustee Shih asked why the funding model excludes Asian students as underrepresented minorities. Mr. Stanek was unsure but suggested further discussion on that topic, focusing on whether Asians are an underrepresented group specifically at SOU.

Trustee Vincent asked if there were any benchmarks or diversity goals for the university and if the goal is to improve appropriations based on the formula. For example, based on some of his interactions with Native American tribes, Trustee Vincent believes there may be more college-bound Native Americans. Dr. Walsh replied that SOU recently hired a recruiter for Native American students. Mr. Morris said the institution needs to develop a way to track enrollment mix to better capture inroads in that regard.

Mr. Stanek then explained the funnel report noting the yield rate and expectations for one of SOU’s largest freshman classes. Trustee Vincent asked whether the goal was to improve the yield rate or to increase the number of applicants. He also asked about the yield rate compared to other universities. Mr. Stanek explained in detail that both would work well but as long as SOU has large freshmen classes, he does not find yield rates troubling. Mr. Stanek noted the comparison would be good to explore. Chair Sayre asked if last year’s freshman class of approximately 700 was the largest freshman class in SOU’s history and Mr. Stanek said it was definitely one of the largest and this year’s numbers will exceed last year’s.

In response to Trustee Bodager’s question, Mr. Stanek confirmed that SOU tracks the high schools from which applicants come and that there are bonus points in the model for students from rural areas.

## **Accreditation Process and Timeline Review**

Dr. Walsh briefly discussed the accreditation process and timeline. She said it is important to note that we thought the deadline would be two years away but it is actually September of 2016. The steering committee is working hard and she is confident we will be ready and will meet the September 2016 deadline. They have a lot of data to analyze and digest and she will present a more comprehensive update in a future meeting.

## **HECC Updates and Reporting Review**

Chair Sayre advised the committee another report will be due to the HECC in December. To this end, Dr. Walsh summarized the work the Provosts have been doing with the evaluation criteria, the governance evaluation criteria, and the mission alignment work. Provosts have been working with the HECC and are awaiting their feedback. Portland State, University of Oregon and Oregon State will be using the criteria starting next month. It is unclear whether the HECC is pleased with the criteria and mission alignment pieces but the presidents and provosts believe they have submitted their best product and will wait for further guidance from the HECC.

Chair Sayre asked Mr. Morris to remind the committee of the whole process. He outlined: the first step is the report SOU submitted to the State Board of Higher Education in June. The second step is the conditions report due to the HECC in December 2015 for feedback. The final

step is in December 2017, which culminates in an opinion on whether the institution is financially sustainable and heading in the right direction.

Trustee Vincent expressed confusion on who has authority to determine what changes SOU would have to make: the HECC or the SOU Board of Trustees. Mr. Morris stated the original language of the statute was that the HECC would make a determination and inform the governor of its opinion. The language was changed from the HECC to this board making the determination of success. The HECC can still issue an opinion but this board has the authority to make the determination on whether SOU is on a sustainable enough track to continue with its own independent board and remain a public university.

Dr. Walsh stated that the HECC is still trying to figure out what its reach will be. Mr. Catz added that the statute specifically says the HECC has no authority except what is included in the statute and all other powers are delegated to the boards. Mr. Morris said the universities have to work to avoid authority creep.

### **SOU - Klamath Community College (KCC) Faculty/Staff Rates**

Chair Sayre advised the committee that they needed to have an important conversation regarding the possibility of an SOU-KCC faculty/staff rate agreement. KCC would like to have policies much like those that exist among the seven Oregon universities for reciprocal staff tuition rates. Chair Sayre added the committee would dedicate a portion of the next meeting to this topic as well. The goal is to present a recommendation to the full board by December.

Dr. Walsh explained that having an agreement such as this could be precedent-setting for the institution. Presidents Saigo and Gutierrez met several times regarding articulations agreements. An agreement was reached where KCC students in certain programs could transfer to SOU with an associate's degree, finish their bachelor's degree at SOU, then get a master's degree. Much of the coursework could be done online or through distance learning. The relationship with KCC is good on the academic side, but Dr. Walsh brought this matter to the board because they were not comfortable extending staff rate privileges between SOU and KCC. She summarized the existing program among the seven universities and referred to the assumptions detailed on her handout. She also stressed that this potential agreement would only apply to staff of KCC and SOU, not to the spouses or children of the staff.

Trustees' robust exchange of questions, concerns, and ideas followed and have been grouped together and summarized for the record:

### Considerations, Questions and Concerns

Would there be a limit to the number of credits, which is currently twelve for faculty/staff? "Staff" ought to be full time or somehow defined for these purposes. Would a limit-cap encourage students to prolong their education? Why would SOU do this with KCC and not other community colleges? Trustees would expect SOU to extend the same to Rogue Community College. Would SOU transfer the benefit to dependents? Is there a model for this elsewhere in the country? Why wouldn't SOU extend the benefit to online courses? Does SOU have the capacity to omit the fully paying students that might be lost to this initiative? Is there a way to track KCC employees taking classes at SOU currently?

## Ideas, Suggestions, and Requests

If seriously considering, SOU may want to alter the percentage of the tuition rates or limit credits or a financial amount. The schools could also implement a pilot program. To encourage the transfer of students to the university, SOU could track transfers and allocate staff privileges based on that. SOU should consider adding an eligibility criterion only for in-state employees.

Additional discussion was around anticipated disproportionality in extending the benefit. Mr. Morris explained that currently students are exchanged between the seven universities, which will begin settling with each other this fiscal year. He noted that significant disproportionality could cause financial hardship for SOU.

President Saigo explained that the reason this initiative came about was because he and President Gutierrez were trying to think outside the box. They wanted to encourage some who might never get another degree if they stay where they are. This could result in loyalty through feeder systems. The schools don't know how many would take advantage of this opportunity but it could be a win-win situation.

Chair Sayre concluded and informed the committee that between now and the next meeting, a small working group could draft finer points for the committee to consider based on this discussion.

## **Adjournment**

Chair Sayre adjourned the meeting at 3:03 p.m.

# Public Comment

# Provost's Report

**Undergraduate Course SCH by Department**  
**Fall 2014 Week Ending 10/5/14 vs. Fall 2015 Week Ending 10/4/15**  
**1 Week After Start of Term**

Department	Fall 2014	Fall 2015	Change	% Change
Art	2,471	1,322	-1,149	-46.5%
Creative Writing	436	520	84	19.3%
Emerging Media & Digital Art	1,070	1,376	306	28.6%
Music	1,576	1,548	-28	-1.8%
Theatre	2,352	2,615	263	11.2%
<b>Subtotal - Oregon Center for the Arts</b>	<b>7,905</b>	<b>7,381</b>	<b>-524</b>	<b>-6.6%</b>

Education	2,310	2,427	117	5.1%
Health and Physical Education	2,087	1,846	-241	-11.5%
Outdoor Adventure Leadership	743	700	-43	-5.8%
Military Science	169	144	-25	-14.8%
<b>Subtotal - Education, Health and Leadership</b>	<b>5,309</b>	<b>5,117</b>	<b>-192</b>	<b>-3.6%</b>

Criminology and Criminal Justice	2,488	2,726	238	9.6%
Economics	1,188	908	-280	-23.6%
Geography	532	352	-180	-33.8%
History	1,275	1,168	-107	-8.4%
Political Science	623	648	25	4.0%
Psychology	4,226	4,216	-10	-0.2%
Sociology/Anthropology	1,955	1,826	-129	-6.6%
<b>Subtotal - Social Sciences</b>	<b>12,287</b>	<b>11,844</b>	<b>-443</b>	<b>-3.6%</b>

Gen Ed and House Experience	801	758	-43	-5.4%
Honors College	182	373	191	104.9%
Learning Commons	28	-	-28	-100.0%
Success at Southern	15	14	-1	-6.7%
Undergraduate Studies	452	383	-69	-15.3%
University Seminar	2,557	3,335	778	30.4%
<b>Subtotal - Undergraduate Studies</b>	<b>4,035</b>	<b>4,863</b>	<b>828</b>	<b>20.5%</b>

Department	Fall 2014	Fall 2015	Change	% Change
Biology	3,422	3,375	-47	-1.4%
Chemistry	1,280	1,664	384	30.0%
Computer Science	1,028	1,344	316	30.7%
Mathematics	3,670	3,817	147	4.0%
Physics	1,087	1,186	99	9.1%
<b>Subtotal - STEM Division</b>	<b>10,487</b>	<b>11,386</b>	<b>899</b>	<b>8.6%</b>

Business	6,328	6,487	159	2.5%
Communication	2,164	2,762	598	27.6%
Environmental Studies	1,739	1,524	-215	-12.4%
<b>Subtotal - Division of BCE</b>	<b>10,231</b>	<b>10,773</b>	<b>542</b>	<b>5.3%</b>

English	1,492	1,424	-68	-4.6%
Gender, Sexuality, and Women's Studies	248	134	-114	-46.0%
International Studies	216	244	28	13.0%
Native American Studies	264	208	-56	-21.2%
Philosophy	917	988	71	7.7%
Foreign Languages & Literatures	2,282	2,240	-42	-1.8%
<b>Subtotal - Humanities and Culture</b>	<b>5,419</b>	<b>5,238</b>	<b>-181</b>	<b>-3.3%</b>

<b>Library Science</b>	<b>-</b>	<b>-</b>	<b>-</b>	
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<b>Physical Education Activities</b>	<b>709</b>	<b>650</b>	<b>-59</b>	<b>-8.3%</b>
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<b>Total Undergraduate</b>	<b>56,382</b>	<b>57,252</b>	<b>870</b>	<b>1.5%</b>
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<b>Total Undergraduate + Graduate</b>	<b>60,238</b>	<b>60,653</b>	<b>415</b>	<b>0.7%</b>
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**Graduate Course SCH by Department**  
**Fall 2014 Week Ending 10/5/14 vs. Fall 2015 Week Ending 10/4/15**  
**1 Week After Start of Term**

Department	Fall 2014	Fall 2015	Change	% Change
Art	8	9	1	12.5%
Creative Writing	-	-	-	
Emerging Media & Digital Art	-	-	-	
Music	91	98	7	7.7%
Theatre	-	-	-	
<b>Subtotal - Oregon Center for the Arts</b>	<b>99</b>	<b>107</b>	<b>8</b>	<b>8.1%</b>

Education	2,323	1,970	-353	-15.2%
Health and Physical Education	-	-	-	
Outdoor Adventure Leadership	-	5	5	
Military Science	-	-	-	
<b>Subtotal - Education, Health and Leadership</b>	<b>2,323</b>	<b>1,975</b>	<b>-348</b>	<b>-15.0%</b>

Criminology and Criminal Justice	-	-	-	
Economics	-	-	-	
Geography	-	-	-	
History	-	-	-	
Political Science	-	-	-	
Psychology	488	513	25	5.1%
Sociology/Anthropology	32	36	4	12.5%
<b>Subtotal - Social Sciences</b>	<b>520</b>	<b>549</b>	<b>29</b>	<b>5.6%</b>

<b>Master in Interdisciplinary Studies</b>	<b>36</b>	<b>15</b>	<b>-21</b>	<b>-58.3%</b>
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Department	Fall 2014	Fall 2015	Change	% Change
Biology	157	134	-23	-14.6%
Chemistry	-	-	-	
Computer Science	-	-	-	
Mathematics	36	41	5	13.9%
Physics	-	-	-	
<b>Subtotal - STEM Division</b>	<b>193</b>	<b>175</b>	<b>-18</b>	<b>-9.3%</b>

Business	155	163	8	5.2%
Master in Business Administration	351	259	-92	-26.2%
Master in Management	138	138	-	0.0%
Communication	16	12	-4	-25.0%
Environmental Studies	13	-	-13	-100.0%
<b>Subtotal - Division of BCE</b>	<b>673</b>	<b>572</b>	<b>-101</b>	<b>-15.0%</b>

English	12	4	-8	-66.7%
Gender, Sexuality, and Women's Studies	-	-	-	
International Studies	-	-	-	
Native American Studies	-	4	4	
Philosophy	-	-	-	
Foreign Languages & Literatures	-	-	-	
<b>Subtotal - Humanities and Culture</b>	<b>12</b>	<b>8</b>	<b>-4</b>	<b>-33.3%</b>

<b>Total Graduate</b>	<b>3,856</b>	<b>3,401</b>	<b>-455</b>	<b>-11.8%</b>
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<b>Total Undergraduate + Graduate</b>	<b>60,238</b>	<b>60,653</b>	<b>415</b>	<b>0.7%</b>
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**Enrolled Student Headcounts**  
**Fall 2014 Week Ending 10/5/14 vs. Fall 2015 Week Ending 10/4/15**  
**1 Week After Start of Term**

	Fall 2014	Fall 2015	Change	% Change	Fall 2014 End of Term	Change	% Change
First Year Students	714	833	119	16.7%	713	120	16.8%
New Transfers	562	544	-18	-3.2%	567	-23	-4.1%
New PostBacs/Graduates	150	119	-31	-20.7%	156	-37	-23.7%
<b>Subtotal - New Students</b>	<b>1,426</b>	<b>1,496</b>	<b>70</b>	<b>4.9%</b>	<b>1,436</b>	<b>60</b>	<b>4.2%</b>
Continuing Students	3,285	3,156	-129	-3.9%	3,310	-154	-4.7%
Returning after Absense	114	154	40	35.1%	118	36	30.5%
Non-Admitted	516	273	-243	-47.1%	1,384	-1,111	-80.3%
<b>Grand Total - Headcount</b>	<b>5,341</b>	<b>5,079</b>	<b>-262</b>	<b>-4.9%</b>	<b>6,248</b>	<b>-1,169</b>	<b>-18.7%</b>
<b>Grand Total - FTE</b>	<b>4,114</b>	<b>4,099</b>	<b>-15</b>	<b>-0.4%</b>	<b>4,356</b>	<b>-257</b>	<b>-5.9%</b>
Resident	3,613	3,230	-383	-10.6%	4,460	-1,230	-27.6%
Non-Resident	1,728	1,849	121	7.0%	1,788	61	3.4%
International	147	156	9	6.1%	154	2	1.3%
American Indian/Alaskan Native	58	56	-2	-3.4%	61	-5	-8.2%
Asian	99	97	-2	-2.0%	104	-7	-6.7%
Black	114	123	9	7.9%	116	7	6.0%
Hispanic	479	514	35	7.3%	490	24	4.9%
Pacific Islander	23	27	4	17.4%	24	3	12.5%
Multiple Ethnicities	356	422	66	18.5%	366	56	15.3%
<b>Subtotal - Diversity (ethnic &amp; intl.)</b>	<b>1,276</b>	<b>1,395</b>	<b>119</b>	<b>9.3%</b>	<b>1,315</b>	<b>80</b>	<b>6.1%</b>
White	3,207	2,990	-217	-6.8%	3,321	-331	-10.0%
Unknown/Other	858	694	-164	-19.1%	1,612	-918	-56.9%
Alaska	75	78	3	4.0%	76	2	2.6%
California	979	1,091	112	11.4%	1,020	71	7.0%
Hawaii	103	117	14	13.6%	104	13	12.5%
Idaho	27	31	4	14.8%	27	4	14.8%
Washington	160	152	-8	-5.0%	161	-9	-5.6%
All Other States	236	247	11	4.7%	258	-11	-4.3%



**SCH by Student Level Within Tuition Category**  
**Fall 2014 Week Ending 10/5/14 vs. Fall 2015 Week Ending 10/4/15**  
**1 Week After Start of Term**

<b>Tuition Category</b>	<b>Fall 2014</b>	<b>Fall 2015</b>	<b>Change</b>	<b>% Change</b>
UG WUE	14,529	16,100	1,571	10.8%
UG Resident	31,259	30,109	-1,150	-3.7%
UG Non-resident	1,523	1,788	265	17.4%
UG Online	6,698	6,781	83	1.2%
<b>Subtotal - Undergraduates</b>	<b>54,009</b>	<b>54,778</b>	<b>769</b>	<b>1.4%</b>
GR Resident	815	661	-154	-18.9%
GR Non-resident	579	465	-114	-19.7%
GR Online	265	259	-6	-2.3%
GR Education Differential	1,639	1,606	-33	-2.0%
<b>Subtotal - Graduates</b>	<b>3,298</b>	<b>2,991</b>	<b>-307</b>	<b>-9.3%</b>
Staff Rates	797	710	-87	-10.9%
Waived Tuition	773	810	37	4.8%
Course Based Tuition	514	801	287	55.8%
Advanced Southern Credit	825	501	-324	-39.3%
Early Entry HS	22	62	40	181.8%
<b>Grand Total - SCH</b>	<b>60,238</b>	<b>60,653</b>	<b>415</b>	<b>0.7%</b>

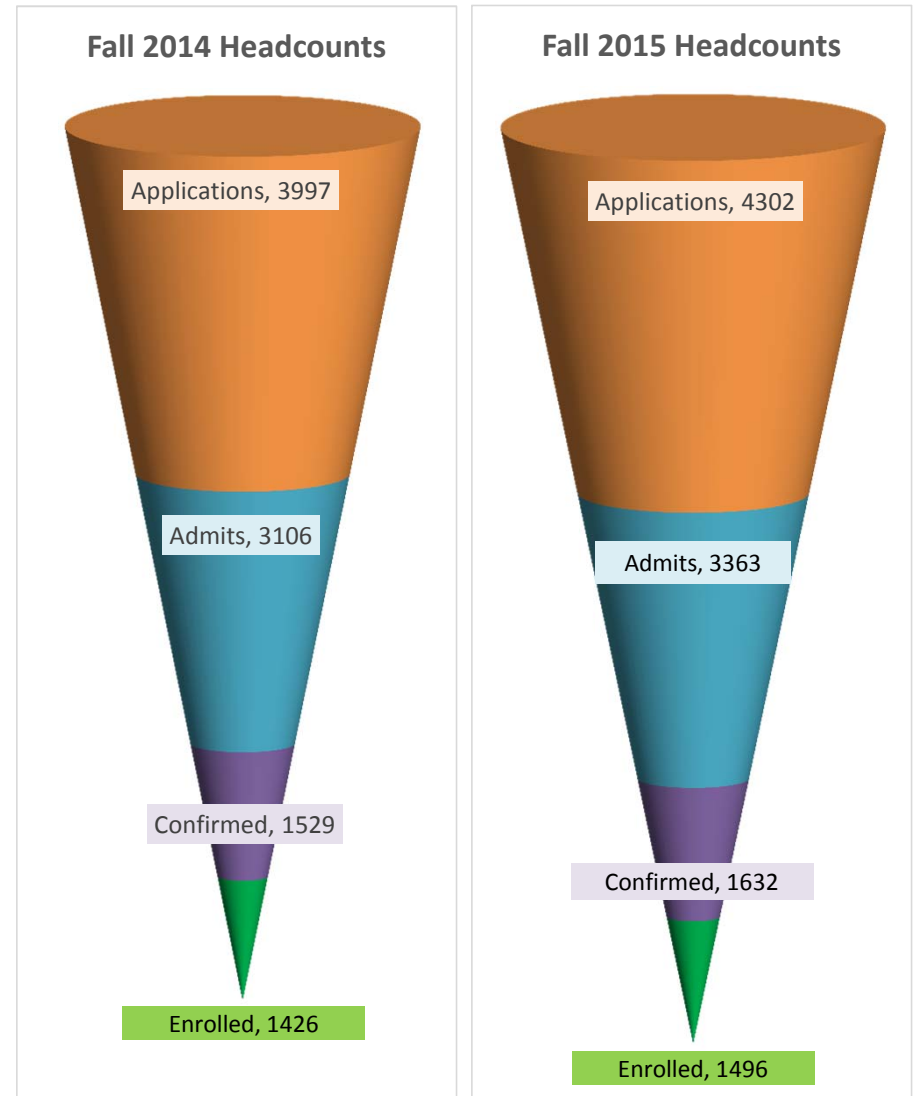
**Funnel Report: New Headcounts by Student Type**  
**Fall 2014 Week Ending 10/5/14 vs. Fall 2015 Week Ending 10/4/15**  
**1 Week After Start of Term**

<b>Applications</b>				
<b>Student Type</b>	<b>Fall 2014</b>	<b>Fall 2015</b>	<b>Change</b>	<b>% Change</b>
First Year - Resident	1,106	1,276	170	15.4%
First Year - Nonresident	1,625	1,713	88	5.4%
Transfer - Resident	501	508	7	1.4%
Transfer - Nonresident	445	488	43	9.7%
Postbacs/Grads/Other	320	317	-3	-0.9%
<b>Total</b>	<b>3,997</b>	<b>4,302</b>	<b>305</b>	<b>7.6%</b>

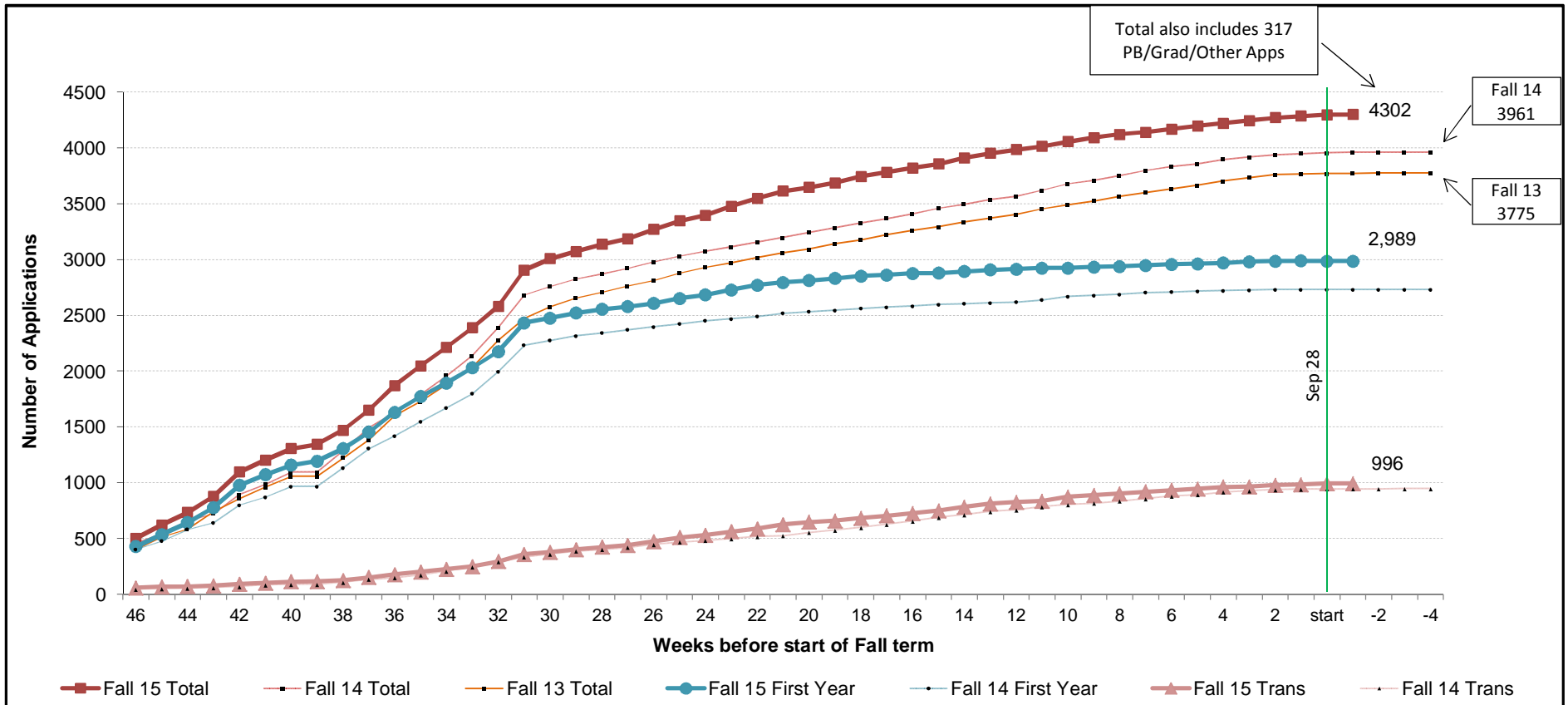
<b>Admits</b>				
<b>Student Type</b>	<b>Fall 2014</b>	<b>Fall 2015</b>	<b>Change</b>	<b>% Change</b>
First Year - Resident	884	989	105	11.9%
First Year - Nonresident	1,229	1,350	121	9.8%
Transfer - Resident	443	435	-8	-1.8%
Transfer - Nonresident	350	419	69	19.7%
Postbacs/Grads/Other	200	170	-30	-15.0%
<b>Total</b>	<b>3,106</b>	<b>3,363</b>	<b>257</b>	<b>8.3%</b>

<b>Confirmed (e.g. deposit paid)</b>				
<b>Student Type</b>	<b>Fall 2014</b>	<b>Fall 2015</b>	<b>Change</b>	<b>% Change</b>
First Year - Resident	372	466	94	25.3%
First Year - Nonresident	405	436	31	7.7%
Transfer - Resident	346	319	-27	-7.8%
Transfer - Nonresident	231	263	32	13.9%
Postbacs/Grads/Other	175	148	-27	-15.4%
<b>Total</b>	<b>1,529</b>	<b>1,632</b>	<b>103</b>	<b>6.7%</b>

<b>Enrolled</b>				
<b>Student Type</b>	<b>Fall 2014</b>	<b>Fall 2015</b>	<b>Change</b>	<b>% Change</b>
First Year - Resident	366	457	91	24.9%
First Year - Nonresident	348	376	28	8.0%
Transfer - Resident	341	310	-31	-9.1%
Transfer - Nonresident	221	234	13	5.9%
Postbacs/Grads/Other	150	119	-31	-20.7%
<b>Total</b>	<b>1,426</b>	<b>1,496</b>	<b>70</b>	<b>4.9%</b>

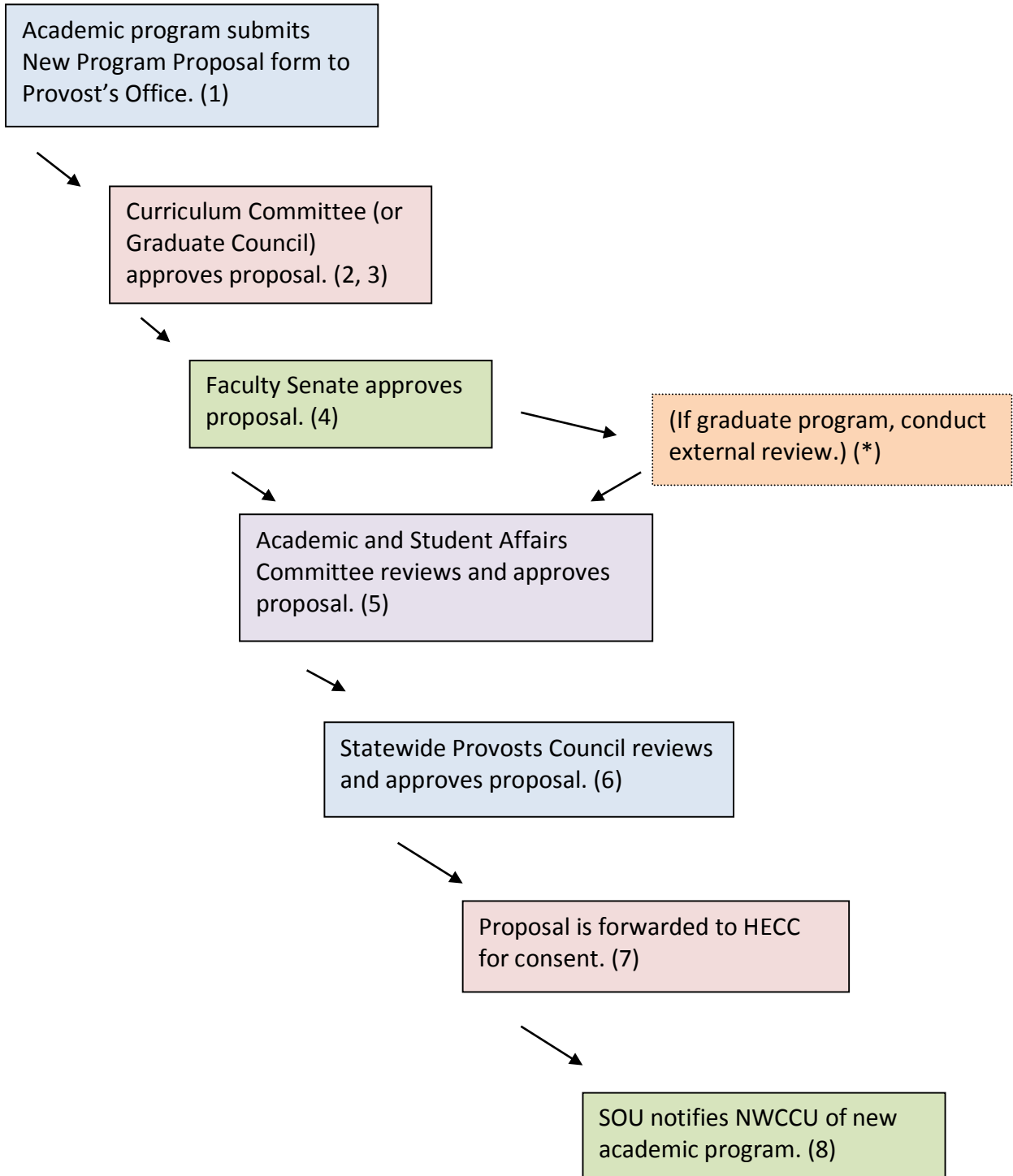


**Funnel Report: Application Activity**  
**Fall 2015 Week Ending 10/04/15**  
**1 Week After Start of Term**



# Curriculum Approval Process

# New Academic Program Approval



# **SOU – KCC/RCC Faculty/Staff Rates**



**Board of Trustees  
Academic and Student Affairs Committee**

**Proposed Terms of Southern Oregon University- Klamath Community College/Rogue Community College Staff Tuition Rate Privileges**

**Southern Oregon University considers the following provisions of the MOU:**

- Southern Oregon University (SOU) would pilot a program to Klamath Community College (KCC) and Rogue Community College (RCC), whereby employees of these colleges could attend SOU at the university's staff tuition rate.
- The current employee tuition rate set at 30 percent of resident, undergraduate tuition, in addition to appropriate fees, would apply. A maximum of 12 credit hours per term may be taken at the staff tuition rate.
- The pilot program with KCC and RCC would begin winter term, 2016, and would be reevaluated after one year.
- Privileges of the pilot program would be limited to KCC and RCC employees only. No transfer of staff tuition rate privileges will apply; the staff tuition rate would not be extended to dependents.
- Southern Oregon University will track the number of KCC and RCC faculty and staff who take advantage of the benefit. Southern Oregon University also will track the number of faculty and staff who participate in the program and transfer to the university.
- The staff tuition rate privileges would extend to courses delivered face-to-face and online.

**Remaining Considerations:**

- Assuming reciprocal privileges at both colleges, if SOU also assumes that more KCC and RCC employees will take classes at SOU rather than SOU employees taking classes at those colleges, a mechanism by which an adjustment can be made to offset SOU's losses should be developed.
  - SOU's registrar, Matt Stillman, is modeling scenarios for the committee to consider and will be at the Oct 15th meeting to answer questions.
- Determine whether "staff" means full-time only or at least half-time (as in the current agreements).

### **Remaining Considerations (Cont'd):**

- If an SOU class is nearly full, does SOU give registration priority to SOU students and staff?
- Does SOU wish to explore creating some type of incentive program linking this staff rate privilege to encouraging the transfer of students from KCC and RCC to SOU?
- Is there a way to determine how many KCC employees currently attend SOU?
- Extending the offer to the remaining community colleges is a question that will need to be addressed at some future point.



# Potential Staff Rates Expansion Implications & Cost/Revenue Modelling

Board of Trustees  
Academic & Student Affairs Subcommittee  
October 15, 2015

Dr. Matt Stillman  
University Registrar  
Director of Enrollment and Retention Assessment



## Summary of Current Rules/Practices

- Available to all Oregon Public University employees and dependents
- Some program restrictions at other institutions
- Maximum 12 credit hours per term – 1 student at a time
- Most fees still apply normally
- Participants pay 30% of resident undergraduate rate
- There is no backfill from the state
- Some restrictions, such as online courses

## Modelling Assumptions

- Only modelling fully-admitted undergraduate students
- Assumes a 180 credit degree, all taken at SOU
- Not accounting for fees
- \$41 in funding per SCH from SSCM model
- \$8210 in funding per degree from SSCM model
- Assumes current tuition levels
- Assumes \$224 per SCH average cost to educate (SOU IR FY 13 figure)





**REVENUE GENERATION & ASSUMED COST TO EDUCATE  
FULL-PAY RESIDENT UNDEGRADUATE VS. STAFF RATE  
ASSUMES FULL 180 CREDIT DEGREE**

	<b>FULL-PAY UG RESIDENT</b>	<b>STAFF RATE</b>
<b>REVENUE:</b>		
TUITION	\$26,460	\$7938
SSCM DEGREE	\$8210	\$8210
SSCM SCH	\$7380	\$7380
TOTAL	\$42,050	\$23,528
<b>EXPENSES:</b>		
AVG. COST TO EDUCATE	\$40,320	\$40,320
<b>NET REVENUE:</b>	\$1730	-\$16,792



## Additional Considerations

- Removing the average cost to educate component, the gross tuition revenue difference is: \$147/credit for a full-pay resident UG vs. \$44/credit for a staff rate = \$103/credit difference. \$397/credit for a full-pay resident GR vs. \$44/credit for a staff rate = \$353 difference.
- Staff rates are administratively more difficult than “normal” students and involve much more effort.
- Because these students would be resident, an expansion could help satiate the 40/40/20 demand.
- Is increased enrollment, regardless of revenue, a goal?
- What is the willingness of partner institutions to pay some or all of the “gap” in price? What are the associated added administrative burdens?
- Are their political issues in only offering this selectively?
- Staff rates are really intended to be an employee benefit, not an enrollment or revenue tool.
- Are we opening up an unsustainable Pandora’s box?

# **Review and Discussion of Institutional Review Report and HECC Conditions Report**

# Southern Oregon University

## Institutional Review Report

May 2015

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## **SOU's Current Situation**

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Southern Oregon University has delivered an outstanding education to thousands of students for more than 140 years. Our institution is a key partner with businesses and community organizations as well as with government agencies and other educational institutions. Together we solve problems, foster innovation, and create economic growth.

As public universities around the country face significant changes in state funding and demographics, SOU is responding with initiatives that connect our students with our community while helping them attain the knowledge and skills needed for success in a fast-changing global economy. We are strongly focused on helping a wide range of students prepare for and be successful in college.

### **"Conditions" & "Retrenchment" - Background and Current Status**

SOU has experienced budget challenges since the early 1990's, when Oregon voters passed Measure 5, shifting the funding for local school districts from local property taxes to state funds. State funding since that time has continually diminished, with increases in one biennium typically followed by significant decreases in the next few biennia. Additionally, the Resource Allocation Model provided less allocation to the types of undergraduate courses offered at SOU, instead favoring technology and engineering programs as well as graduate and research programs. As a consequence SOU has had to rely on student tuition for the largest percentage of its revenue, a situation that makes us susceptible to enrollment swings.

In fall 2011 SOU had the largest total enrollment in history. This was the culmination of strategic rebuilding over several years and partly attributed to a strong master academic plan and a 5-year strategic plan developed in 2009. This enrollment growth followed 4 years of significant enrollment declines that began in 2004. In response to that period of growth (2007-2011) SOU added to its programmatic offerings, increased the number of course sections, and implemented new support programs.

In fall 2012 enrollment dropped 4% from the prior year. Additionally, we experienced significant challenges within our Admissions staff and leadership that negatively impacted our recruitment efforts while at the same time student retention rates flattened. To address the revenue shortfall that followed we implemented layoffs, not filling most vacant positions, and increased tuition rates.

In fall 2013 our enrollment dropped again to 5% below the prior year. At the same time we experienced increases in personnel and benefits costs. These enrollment declines were creating serious financial difficulties; however, we were still projecting an ending fund balance of 6% by year end. An OUS accounting policy for recording bad debt reserves resulted in an additional \$2M transfer coming out of the general fund. These challenges resulted in our fund balance dropping below the 5% minimum required by the State Board of Higher Education (SBHE).



## Identifying & Analyzing the Problem

Lessons were learned by the prior retrenchment in 2007. Eliminating a few staff positions, one faculty line, but maintaining nearly all of our academic programs was not thorough enough a response. It did however result in SOU becoming very "thin" administratively. At the same time the oversight and management of our academic programs were less than adequate, this due to the grouping of nearly all our academic departments residing within a single school division.

It was clear from early projections of fall 2012 enrollment that the university needed new tools and analyses to inform upcoming decisions. That year we conducted a capacity study focusing on enrollment, facilities, and human resources. In 2013 we undertook a massive program prioritization process designed to evaluate every department, program, and office that either consumed or produced resources. Shortly afterwards we produced a workforce productivity study and those results were intersected with findings from the prioritization process. We integrated our Student and Academic Affairs divisions. We analyzed data conducted by the Chancellor's Office that was based on the national Delaware cost study model. The recommendations and results from all these efforts informed us how to adapt.

We realized that the status quo was not working and established a transformational or change culture in 2013. But, change is difficult, both in execution and in acceptance, and with any major change effort some people become strongly supportive while others get dismayed when changes move too quickly. Changes recommended from these analyses included the integration of academic and student affairs, the reorganization of all academic departments, a new position to provide direct oversight of all academic resources, a reduction of faculty release, the consolidation of a service center, and identification of academic programs for potential reduction. It was not easy but synthesizing all these data into these actionable initiatives set us on the right track to being more agile programmatically while providing the opportunity for us to build stronger fund balances.

## Remedies in Progress

This first year of retrenchment has led to new opportunities in managing our finances. Serious cost decreases, including furlough days, staffing reductions, and structural changes, as well as fund transfers, were included in a budgeting plan that is assisting the university in achieving a 5% fund balance by the end of the 2013-15 biennium and a 10% fund balance by the end of the 2015-17 biennium. Consistent with our retrenchment plan, our metrics have been reported quarterly and in all categories we are meeting or exceeding our targets for 2014-15. Our fund balance especially is showing an impressive single year turnaround from 3.5% ending in FY14 to our currently projected 8.3% for FY15, now just 6 weeks prior to closing.

We have strengthened our student recruitment processes with new leadership that has reinvigorated the Admissions Office and has led to more integrated and innovative approaches. New marketing and communication strategies have resonated well with prospective students. We are building partnerships with southern Oregon school districts and community colleges. While continuing to focus on and prioritize recruitment of in-state students, more recently our recruitment and outreach efforts have strategically targeted select communities outside of Oregon in order to attract non-resident students

and help balance our enrollment mix. Additionally we have been paying particular attention to improving both our conversion rate (applications to admits) and our yield rate (admits to enrolled) within the overall admissions funnel.

**[see Appendix 1: Admission Recruitment Details]**

We have been addressing SOU's freshman-to-sophomore retention rate in multiple ways. Historically, many students come to us for their first year and then transfer to another institution or drop out due to financial, academic, or personal issues. To address retention issues, we have packaged financial aid much earlier than usual, counseled students in ways to lift their registration holds, and provided housing remissions. We've created an "early alert" SOU Cares system for faculty and staff to identify and assist students at risk; developed the Learning Commons to provide a wide array of academic support services and tutoring and have integrated retention best practice strategies into academic curricula through better advising.

The PEAK (Professional Experience, Achievement, and Knowledge) Jobs program, Honors College and our general education "House" initiatives are key aspects to establish a distinctive campus with the intention they will drive increases in both recruitment and retention.

The continuing success of SOU depends on our offering an academic and residential environment that attracts students from the region, from the West, and from around the world. The new 700-bed North Campus Village and dining facility opened in fall 2013 through a public-private partnership. There was an expectation that new freshmen students living in this facility would retain better than prior year residence hall students and that expectation has proved to be true.

The data gathered from our capacity study provided key information. The students who we retain in highest percentages fall into clear categories: they are athletes; students who participate in cohort-related activities, work on campus, or participate in student activities and clubs; or live on campus. The students who retain are engaged with the campus. We have focused a number of our initiatives in response to these data. As a result, we saw the largest year-over-year increase in retention for SOU with the fall 2013 freshmen cohort; an increase of over 6 percentage points from the prior year retention rate.

Data from our capacity study and program prioritization process have helped us rethink and redesign academic structures as necessary to ensure a nimble and responsive organization. Significant reorganization and restructuring plans have been implemented as a result. Our academic reorganization has replaced deans/associate deans with division directors. We have several key recent hires within the Provost's office: Assoc. VP for Enrollment and Retention, Director of Grants and Sponsored programs, Assoc. VP for Academic Resource Management, and a budget officer. Additionally an Assoc. VP for Budget and Planning was appointed in Finance and Administration. These additions have greatly improved our ability to forecast, report, manage, and assess all our efforts.

Student success is a critical aspect of SOU's mission, but many legacy structures residing within higher education prevent students from achieving success. Chief among them is the way in which most institutions are organized. Our academic reorganization provides students with improved access to

programs and services and SOU has taken an intentional approach to eliminating divides that exist across campus.

The SOU Foundation Board has a new vice president who brings new energy. In recent years, the board has had stable leadership and strategically added new membership. They have a renewed sense of inspiration, purpose, and direction. In their newly adopted fundraising plan, they focus on a scholarship campaign to support students in three areas: Need-based scholarships for Oregon residents, Honors College students, and Employment Scholarships (for our PEAK jobs-on-campus initiative).

We are well aware of the uncertainties in our environment, including the uncertainty regarding state allocations, the state economy, student enrollment trends, benefit and OPE costs, collective bargaining and salary expectations, and the new governance structure. Taken all together, they make it perfectly clear we must budget effectively in the years to come.

## About SOU

Southern Oregon University's strong background in liberal arts continues to bolster a comprehensive curriculum that infuses a high-quality liberal arts education into a diverse selection of degree programs. Major offerings are available in the social sciences, the humanities, the STEM fields, the arts, and professional programs of business and education. Comprehensive liberal arts universities such as SOU have mission statements that describe high level expectations for their students. Mission statements generally do not fully explain the complete identity of an organization, that understanding occurs only with deeper insights into the operations, the deliverables, and the strategic priorities of the institution.

SOU is routinely faced with questions regarding our mission and the focus on liberal arts as well as inquiries regarding our responsibility to serve the region versus promoting our institution as a destination campus. Our response: we always strive to find a balance in providing both a liberal arts education while meeting the professional and workforce needs of our region, and indeed it is that strong liberal arts curriculum which allows us to meet those needs. Prospective employers repeatedly say they want candidates that possess the ability to think critically, work collaboratively, and solve real world problems, dispositions that are at the core of a liberal arts education. SOU also needs to maintain a balanced enrollment mix, one that produces strong revenue streams in both tuition and state allocations. To do this we provide equal attention and effort to attracting students from within our region but also recruit students from areas outside of it. Consistent with the American Association of State Colleges and Universities definition that "... a regional university functions as stewards of place..." we remain committed to leveraging the human and intellectual capital of our local students and help contribute to a sustainable workforce within our region.

**[see Appendix 2 - Identity, Community, & Academic Portfolio]**

## Niche & Value

SOU serves its community; our largest major degree programs are all integral to the economic growth of the southern Oregon region. For example, Jackson County embodies the second largest arts cluster in the state, after the Portland metropolitan area. SOU's strong arts programs supports and foster that cluster.

SOU is located in one of the most diverse bioregions in the world and maintains close ties to federal agencies through its programs in environmental studies, biology, and chemistry. We serve the needs of the region for students with excellent communication, practical and analytical skills.

Our data indicate that SOU's competition ranges from community colleges and other OUS institutions to, frequently, private liberal arts colleges. Many successful Ashland High School graduates, for instance, go out of state to college. In rural Oregon, however, a significant area of "competition" is jobs - without a strong college-going culture, students frequently opt out of any postsecondary education. The pipeline for students targeted within the 40-40-20 goals in southern Oregon needs greater support; however, SOU's innovative partnerships and academic programs involving middle school and high school students are major contributors to counteracting these decreases in college bound students from Southern Oregon. In fact, over the last 3 years SOU has maintained a consistent percentage of admitted students from our 7 county region.

### New Governance

Effective July 1, 2015 SOU will be operating as an independent public university with its own Board of Trustees. There are significant efforts underway in transitioning from the oversight of the SBHE governing board to a new coordination of activities with the Higher Education Coordinating Commission (HECC). The SOU Board of Trustees and its subcommittees of Finance, Academics, and Executive, have been preparing for this transition, meeting and engaging in regularly scheduled sessions since January.

With powerful connections to our region and distinctive programming and mission, SOU welcomes the opportunity to assume the responsibilities of its own governance. Our students believe that an institutional board that understands our mission and our challenges, and clearly understands our student population, would more effectively advocate for adjustments in funding.

External constituencies such as our alumni, the local Chambers of Commerce, Southern Oregon Regional Economic Development (SORED), local and regional school districts, and others, appreciate the heritage and mission of SOU and understand the critical connections to the economic stability and growth of our region. Many have long-standing successful partnerships, on-going collaborations, or emerging alliances with SOU programs, faculty, and staff. These local external groups are supportive of a governance structure that offers greater university autonomy, increases regional "ownership" of the university, and more fully represents the needs and values of our region.

### Economic Impact

In 2013, SOU produced an economic impact assessment with revenues identified at \$13.5 million in state appropriation that gave rise to additional SOU revenue of \$79.9 million. With that state investment, SOU brings in \$5.91 in revenue for every \$1 invested by the state of Oregon. More importantly is the economic assessment of the university's impact on the local economy, determined to be \$237 million. Using the same \$13.5 million in state investment, SOU infuses \$17.55 into the local region for every \$1 invested by the state. The economic impact becomes even more impressive if larger multipliers are applied; ones that recognize these dollars are likely being re-spent more than just one time.

A critical part of this economic impact relates to the graduates who stay in the state of Oregon after receiving their degree. According to a recent survey conducted by OUS, 70% of SOU graduates secured employment within the state after graduation and of those, two thirds were employed within Jackson and Josephine Counties. Recognizing the difference in median earnings of employees with baccalaureate degrees versus those with high school diplomas suggests these graduates created a local impact of over \$26 million.

[see Appendix 3 - Economic Impact Assessment]

## **Academic Programming**

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Our retrenchment plan was designed to accomplish several major objectives. One objective was to eliminate programs that have low enrollments and low student interest. Another objective was to re-size all programs to their projected enrollments for the next five years. This re-calibration provides the flexibility to allow investment in existing programs that have capacity to grow and new programs that meet regional needs and student interests.

The retrenchment plan was not designed to change the essential character of SOU as an institution, but it does give us the opportunity to re-focus SOU's program portfolio and use more effectively the resources available. The plan enables the university to reflect more intentionally on the needs of students preparing for the shifting social and economic environment of the 21st century.

The program prioritization process was designed to quantify and evaluate every program, department, and key university functions. Its main objective was to help identify the proper balance in allocating those resources to areas deemed to be essential to achieving the mission and strategic goals of the institution. This was an invaluable exercise for our retrenchment planning in that it provided much needed evidence and justification for eliminating and downsizing programs. Moreover, the prioritization findings, the capacity study, and the workforce productivity study all continue to serve us as we move forward in considering additional program reductions and to strategically plan for investing in programs where there is potential for growth. Data from these analyses, including future updates to them, and the oversight by our new AVP for Academic Resource Management will assure that our academic program offerings will be continually scrutinized and adjusted as needed so that the university remains fiscally viable.

Through academic reorganization and planning, we have focused intently on curricular reform: changes that strengthen our mission, refine our focus, and serve our students more efficiently and effectively. Academic planning processes will contribute substantially to cost savings but, importantly, also to forward-looking curricular approaches that attract and support today's students and prepare them for employment opportunities. It is vital that we create a springboard for growth and for the development opportunities that will arise in the future.

The academic planning process includes following through with program elimination and reduction scenarios described in the retrenchment plan and implementing program metrics and accountability.

Academic divisions, working collaboratively with the Provost's Office, ensure program costs are reduced and enrollment strategies are in place to enhance revenue. Each Division has developed a plan that serves as a blueprint for making adjustments for more efficient course scheduling, better monitoring of faculty release time, managing supplies and services expenses, and planning for more focused curricula attuned to today's students and career opportunities.

### Program & Mission Alignment

Our mission statement is intricately aligned with the core themes that have been adopted by our accrediting body, the Northwest Commission on Colleges and Universities (NWCCU):

1. **Student Success:** SOU students will be prepared for personally rewarding vocations and satisfying lives by developing intellectual and practical skills.
2. **Intellectual Growth:** SOU students will acquire and expand upon both broad-based general and specialized knowledge in one or more specific discipline(s).
3. **Responsible Citizenship:** SOU students will be prepared to serve in personally and socially responsible roles, both locally and globally.

These themes are the basis that NWCCU uses in evaluating and accrediting our institution. Progress toward them continue to be tracked very closely within a myriad of student assessments but also within the outcomes established in both the academic and administrative and support departments.

Additionally, at the request of the HECC and in consultation with the President's Council, the statewide Provost's Council is in the process of developing a matrix that will assist all seven public institutions in supporting the state's goals for increasing access to quality education and ensuring student success. That work is ongoing and once finalized will help inform SOU's curricular and co-curricular planning efforts.

### Re-Structuring

SOU has undertaken major cost reductions that have affected every administrative office of the university. In 2009-10, the global economic downturn led to severe state reductions and reduction of SOU's reserves. Despite these reductions, the decision was made to preserve academic offerings and services that directly impact students. In that year, staff reductions totaled approximately \$1.5M: 10 administrators and 4 classified staff were noticed, and 9 vacant positions were eliminated.

In 2012-13 SOU again reduced expenses. Student Affairs and Academic Affairs were integrated and the Student Affairs areas were extensively reorganized. Staff reductions that year totaled \$1.238M. These included 7 administrators, including the Vice President for Student Affairs and the Dean of Students, and 10 classified staff.

Across the campus, there have been staff reductions in areas of Student Health and Wellness Center, Human Resources, custodial and grounds staff, and IT. We outsourced our bookstore to capture a \$1 million fund balance. Administrative staff and faculty members are currently taking furlough days. Assessments of our auxiliaries have been increased. We consolidated the services of our staff employees

into a Service Center model that more efficiently manages all the accounts payable, budgeting, and HR/payroll duties; functions previously duplicated across dozens of departments.

With the creation of the new academic divisions and a consolidated service center, SOU achieves budget savings from eliminating deans and creating staffing efficiencies, projected savings that total \$1.08M. With this reorganization, eleven currently budgeted staff lines were eliminated (2 administrative, 8 classified, 1 unclassified) through retirements, not filling open lines, and layoffs.

At the end of this academic year SOU will have a very large number of faculty retire and re-investment in faculty positions will be critical; however, we must 1) balance the distribution of our tenure track faculty with those in instructor and adjunct roles, 2) balance the distribution of ranks (Assistant, Associate, Full) within the tenure track faculty, and 3) strategically reinvest in programmatic areas.

## **Enrollment and Completion**

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Upcoming fall 2015 enrollment patterns demonstrate strong potential, particularly with resident freshmen. To date resident freshman show a 19% increase in applications, a 20% increase in admits, and 31% increase in paid deposits from this time last year. Overall, including all freshmen and all transfer students, there is a 12% increase in applications, a 17% increase in admits, and a 33% increase in paid deposits.

**[see Appendix 1: Admission Recruitment Details]**

Despite these promising signals, we continue to use very conservative enrollment projections in our planning, projections that come from the most current work in the OUS Institutional Research office. For fall 2015, these point to a 1.1% decrease from fall 2014 and a 0.2% increase between fall 2015 and fall 2016.

As we strengthen the SOU brand, we will continue working on plans regarding WUE and differential tuition. In fall 2013, we implemented differential tuition for three programs: undergraduate programs in theatre arts and music and a graduate program in education.

Altogether, data-supported initiatives are creating stronger enrollment planning, more coordinated recruiting and retention strategies, and a stronger plan linking enrollment and budget planning.

### **Enrollment Management**

A key factor in all our budget and organizational planning has been consideration of enrollment patterns, recruitment, and retention strategies. SOU is moving forward aggressively and with new leadership in these areas and with initiatives that connect us with potential and existing students, their families, and alumni in Oregon and around the country. We have combined a sophisticated array of strategies with a refined ability to retrieve, analyze, and apply data.

These strategies are being implemented with consideration given to the state's changing demographics. According to the Western Interstate Commission for Higher Education, the total number of high school graduates in Oregon is projected to gradually decline and hold steady around an average of 37,500

through 2022-23. There will be a brief spike in the three years following before high school graduates begin declining again. Additionally, the proportion of those that are white non-Hispanic will see a drop from 78% in 2008-09 to 60% by 2027-28, while Hispanic graduates will increase from 12% to 32% over that same period.

An SOU enrollment and recruitment team has been working strategically to positively impact enrollment. Preview Day numbers and admission application “funnel data” for fall 2015 are extremely positive, attributed in part to the following:

- Communication plans and recruitment efforts have been enhanced so that students are aware of first-year experiences, faculty-student engagement, and distinctive programs such as Houses, Accelerated Baccalaureate, Honors College, and PEAK jobs.
- Recruiters for specific territories receive weekly reports within primary (southern Oregon), secondary (Portland and the rest of Oregon), and tertiary (out of state) markets.
- With new automated marketing and recruitment tools, we have consolidated and refined management of contact/prospect information for targeted audiences.
- Social media assets, the SOU website, digital media productions, advertising, print materials, and other communications have created an effective shared messaging platform that is driving awareness and interest among our target audiences.
- Deployment of a summer bridge program to prepare freshmen (primarily Oregonians) given provisional admission or who have been identified as success challenged.
- College fairs, social media messaging, and specific campaigns are targeting Portland, Colorado, Arizona, Nevada, southern California, Idaho, and Washington.

**[see Appendix 1: Admission Recruitment Details]**

## **Student Profile**

In fall 2014, SOU student headcount was 6,245 (4,353 FTE). 90% were undergraduates, 10% were graduate students. 71% of our students are Oregon residents and 29% are non-residents. Within our resident student population 61% are from Jackson County, 17% from surrounding southern Oregon counties, 11% from a three-county Portland area, and the remaining from other Oregon counties. Approximately 43% are men and 57% women, 70% are age 17-25, and 30% of them are 26 and older; the average age of our students is 26. We are very pleased that 12% of our students are from underrepresented ethnic groups and if including students reporting a multi-racial affiliation the rate increases to 16%. When considering all ethnic and internationally diverse student populations the rate increases to 18%. These numbers have grown steadily over the past six years at SOU as we have increased our targeted recruiting of diverse populations and strengthened our Office of International Programs and the Office of Diversity and Inclusion.

**[see Appendix 4: The SOU Student]**

Many factors affect SOU student retention, persistence, and graduation rates. Data show clearly that students who live on campus, work on campus, play on athletic teams, and study in cohort-related programs and practical experiences retain at higher rates than those students who are not so deeply connected and engaged. For example, admitted undergraduate students who participate in intercollegiate athletic programs retain at a 10% higher rate than other students and those that are



employed on campus retain at 11% higher rate. We have responded to these data by strengthening and increasing opportunities for connection in all these areas such as expanding work opportunities that now include more than 1000 student jobs per year and adding targeted cohort programs such as the SOU project-based general education program called the House Experience and the SOU Honors College.

The Associated Students of SOU have stated that the first priority of their constituents, in order to keep tuition increases manageable, is to advocate for greater state support. In small group sessions, students express repeatedly that the connections they have with SOU faculty and staff keep them enrolled and inspired, despite the challenges in their lives. Students want to keep reasonable class sizes and close contact with their professors. Feedback from alumni emphasizes that they deeply value the personal connections and the balance of liberal arts and practical experiences that are the hallmarks of an SOU education.

### Degree Output

SOU conferred over 1000 certificates, bachelor, and master degrees during the 2013-14 academic year. Over 190 licensure recommendations in teacher education were submitted to the Teacher Standards and Practices Commission (TSPC). The number of bachelor degrees awarded has increased 18% over the last 5 years but we recognize that over the last 10 years conferred degree counts have not shown the same dramatic increases as other Oregon public universities. This is simply a function of total enrollment. Over this time period the number of degrees produced by all Oregon publics, including SOU, have been 21-23% of their total FTE enrollment. However SOU's enrollment has remained somewhat constant during this period with only a 5% growth while the other institutions growth has ranged anywhere between twice to five times that rate. This difference in enrollment growth skews the perception that SOU is not keeping pace in degree production. In fact, over the last 10 years SOU has produced the same number of degrees per capita as the other universities.

[see Appendix 6: Degree Quality & Value]

## Priorities, Planning, & Financial Viability

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The SBHE and the Chancellor's Office have asked us to measure financial sustainability through our budgeted operations ending fund balance. A drop in enrollment in 2013 and a mandated accounting adjustment caused SOU's reserve to drop below the SBHE's mandated 5% minimum. Accordingly, our current financial sustainability goals are to (1) achieve a 7.6% or better ending fund balance as of June 30, 2015, and (2) achieve a 10% or better ending fund balance by June 30, 2017.

Our strategies have included academic program elimination and reduction, reorganization of academic affairs, mandatory unpaid furlough days, reduction in personnel, both staff and faculty, and increased internal administrative overhead assessment. However, in moving forward, it is impossible to construct a financial model that exactly predicts all the possible variables impacting our modeling. Variables such as future enrollment, future state allocations, health care and PERS benefit costs and staff and faculty bargaining outcomes are well understood and monitored regularly but many other external forces can

quickly derail a financial model. At present SOU is on track to achieving an ending fund balance of 10%, or better, by the close of the 2015-17 biennium allowing us to weather unforeseen issues.

### Level of Investment

The investment that Oregon makes in state funding for a resident undergraduate student at SOU can be added to the additional investment the student makes in tuition payments to represent the total contribution required to earn a four year degree. Last year at SOU that amounted to \$38,378 and represents the smallest investment among the four TRU's. However, there is a gap between this total investment to earn the degree and the cost to deliver that degree. The gap for SOU students is the largest among the TRU's. SOU continues to try and protect its students by keeping tuition rates low while at the same time absorbing the decreases in state appropriation.

**[see Appendix 5 - Investment Calculations]**

Since many SOU students struggle financially, we must continue to be diligent in keeping tuition increases to a minimum so as to continue to provide access for our rural Oregonians. However, the State of Oregon and the HECC also have a critical role for the state to reach the 40-40-20 goal. It is therefore imperative that Oregon reinvest in rural regions such as ours and adequately subsidize the costs to educate Oregonians seeking a baccalaureate degree.

With a shift to an outcomes-based versus a credit-hours-based state appropriation funding model, it is very important for the state to partner with us in strengthening resources and student success initiatives, supporting and promoting student persistence and the completion of degrees. Further, the new model provides incentives for at-risk populations such as 1st generation, low-income, and underrepresented minorities, all students that require even larger resources and efforts to help succeed. As a result reducing that gap between total investment and total cost to educate now becomes a larger challenge.

### 40-40-20 Goals

The SOU Recruitment Plan for 2014-15 suggests growth rates in our targeted populations are in line with historical trends. However, achieving 40-40-20 targets for SOU requires us to continue to achieve a nearly a 3% growth rate in conferred degrees each year for the next 12 years.

While SOU has the physical capacity to support significant enrollment growth on both the Ashland and Medford campuses, increasing the number of rural students who are prepared for and can be successful in college requires investment. SOU is working with planning partners across the region to achieve 40-40-20 goals.

### Financial Position

#### **Fiscal Year 2014**

While largely successful, the one-time savings, primarily from transfers of fund balances from Auxiliaries into the general fund, were down a bit from the original plan. However, other one-time savings from reorganization were achieved. Revenue was slightly better than projected due to a continuing shift of student profiles to more online and more non-resident students who both pay slightly higher tuition.

Additionally, miscellaneous other revenue was up over \$1 M due to one-time events that are unlikely to repeat. Strict implementation of the retrenchment plan, primarily in areas of staffing and the management of that staffing, have delivered on the projected savings. There was also strict adherence to the spending plan for service and supplies which kept discretionary costs from negatively impacting fund balance.

#### **Fiscal Year 2015**

Continued focus on the process of managing faculty through the Provost's Office has kept SOU on target for projected faculty savings, and even slightly ahead. Significant effort has resulted in increased revenue due to small increases in enrollment over projections, as well as the change in the mix of enrolled students.

Due to being well ahead of the retrenchment targets, SOU has been able to invest in some necessary IT infrastructure and return planned transfers from our housing division, allowing necessary investment in their facilities as well as future rate moderation. Continued diligence on spending decisions in the area of service and supplies has kept spending to a minimum.

#### **Strategic Priorities**

SOU's ongoing sustainability and success depend on a strong vision and strategic plan for the entire university. After the transition to permanent leadership and a new governing board, SOU will initiate a new strategic planning process, one that will build on all the work that has been done within the last two years. Moreover, the changing realities of our enrollment mix, tuition options, and local and national economies require that the university plan in an intentional way that is unencumbered by our current retrenchment process.

SOU's future strategic plan will ensure flexibility. We must be nimble and responsive with regard to key benchmarks related to enrollment and state allocation, enrollment projections, demographic changes, and other environmental scans. We will be proactive by establishing priorities for reinvestment and understand the importance of investing in areas central to our mission while reducing costs overall. Over time, with an ongoing fund balance of 10% or higher, we will have sufficient financial flexibility to invest regularly in the university's priorities while buffering us from fluctuations in enrollment. With strong administrative and faculty leadership, we are confident in developing a new strategic plan that provides a solid foundation for mission-driven and data-driven decision making.

SOU remains committed to achieving fiscal stability through a dynamic approach to recruitment and retention, budget development and resource management, and developing strategic partnerships. We recognize that these objectives require continuous self-evaluation, strong fund balances, the ability to adapt quickly in a changing environment, and collaborative approaches to solving problems.

We must continue to strengthen the University's role as an economic and cultural partner and catalyst for the region through our curricula, scholarship, and service. To that end, SOU will rely on a new economic impact study commissioned by the president's office this past January to inform our understanding of how to better develop our academic and support programs in ways that bolster the

local community and the greater region. Building relationships is a critical focus for the institution to assure ongoing opportunities for recruitment and collaboration with our local partners.

We need to do more to improve retention rates. Student retention from first to second year remains a challenge for SOU. To address this issue, we launched initiatives in fall 2013 based on nationally recognized best practices for retention. As mentioned earlier we opened an Honors College and initiated two more freshmen cohort learning communities called the House Experience, an alternative general education program that is project-based and team taught. Also mentioned previously, we have finished construction on a new housing and dining complex and made available increased numbers of campus jobs for students. Student club participation and attendance is soon to be tracked to determine how these activities add to our student retention rates. The athletic department has started two new intercollegiate programs this year in men's soccer and women's wrestling as well as established a new sport band. Research indicates that students involved in these types of programs have retained at higher rates than students who do not engage in these cohort experiences. Recent results of these efforts were seen in the large increase of our fall 2014 retention rate cited earlier.

\$250,000 was made available to SOU as a result of a legislative action. The campus agreed that student success—a core theme in our mission—would be something that all stakeholders could support. We then engaged the entire campus in identifying, reviewing, and implementing initiatives that specifically focused on investing in student success.

A call for proposals went out to all faculty, staff and students during fall term; over 30 proposals were submitted. They ranged from small support initiatives to better connecting students to resources on campus to the creation of a comprehensive bridge program that supports students identified in academic at-risk populations.

Each proposal underwent extensive review by members of our Faculty Senate, University Planning Board, and Student Government. The University's Enrollment Council then evaluated all of the feedback from those various entities, and subsequently made recommendations for funding to the Executive Cabinet. The amounts per each proposal ranged from \$1,200 to \$120,000. What follows is a partial list of the approved initiatives:

- Bridge Program
- Student Needs Assessment
- Science Tutoring (Learning Commons)
- Mental Health Library and Digital Mental Health Website
- Technology Relevance in Music
- Long Nights Against Procrastination (hosted by the University Library)

Other initiatives currently under consideration include:

- Open Access Textbooks
- Faculty Writing Fellows Seminar
- Center for Innovation

Part of the proposal evaluation includes details about how Institutional Research will identify and track participation to determine its return-on-investment (ROI). The key measure in this includes the retention rate for the students involved in the programs and how that drives finding permanent funding for the program if its ROI is significant.

Although this was an intensive and sometime very cumbersome process, the administration was committed to the need to being transparent and collaborative and the campus buy-in has been incredible. It required a considerable effort on the part of many people but it is serving as a catalyst for excellent conversations to occur about student success on our campus.

We have set aside within our Retrenchment Plan another \$250,000 for investment next year for a similar set of initiatives. A review of the current process to determine what might be done more effectively and efficiently, while working closely with our new governing board, will establish a robust method for SOU to use in considering the next round of proposals.

## Summary

Southern Oregon University is focused on investing in programs designed to support sustained enrollment growth and increased retention. Continued focus on efficiency and utilization metrics will assure we will keep costs to a minimum, while still delivering what is unique about an SOU education.

SOU is committed to working to meet the higher education needs of Oregonians as effectively and efficiently as possible. The most significant challenge facing our university is the long-term trend in reduced public funding. Apart from reversing that decline, the most important focus will be adherence to a sustainable financial plan and the flexibility for operational and programmatic decisions. SOU is committed to alignment across all Oregon public institutions, including high schools and community colleges, our contribution to achieving the goals of 40-40-20, and other HECC strategic priorities.

It is our hope that this institutional review identifies the clarity of our situation, the strength of our institution, our competitive niche, our program alignment with regional needs, and especially our pathway to long-term financial viability. We are confident that we will succeed in growing and sustaining a diverse and distinctive university culture that inspires connected learning and a passion for making a difference in the lives of our students. As President Saigo is fond of saying, "We treat every student as if they're own."

# **Appendices**

## **Appendix 1: Admission Recruitment Details**

The Office of Admissions has collaborated with the Office of Financial Aid, Institutional Research, Marketing, Student Life and other campus community members to increase undergraduate enrollment by utilizing innovative and proven recruitment strategies and effective use of institutional resources including:

First and foremost, our main concentration has been all about building relationships – at every level.

1. Recruiting team relies heavily on the relationships we have been striving to build
2. Increased visits and renewed relationships with the regional community colleges in Oregon and Northern California
  - Strengthened relationship between SOU, RCC, and KCC.
  - The Office of Admissions continues to explore additional ways to leverage time on community colleges statewide
3. We are recruiting and enrolling new students at a time when retention is recognized as a key component of enrollment management, since it has an impact on overall enrollment and is a measure by which the recruitment and decision-making of new students is based
4. Financial Aid is an integral component to the admission and enrollment process and the formation of a comprehensive enrollment strategy
  - The Office of Financial Aid worked diligently to roll out award letters sooner rather than later
5. More aggressive remissions budget
  - Working with AVP for Retention and Enrollment, Director of Financial Aid, and Director of Housing – we have been able to focus on expansions of need and merit based funds to ensure that students can offset their college costs and will assist with retention
6. Examining our current opportunities and promoting SOU as a university that is widely recognized as a distinctive institution where students work with faculty and staff, with surrounding communities, and with each other to explore and tackle real world problems
7. Our office has leveraged technology to more efficiently serve students in the recruitment funnel
  - Strategic use of communication plans
  - Developed and deployed a new look for our outreach and recruitment publications and materials (both paper and electronic)
    - Doing so has allowed our office to develop a recognized brand
    - Has reduced the amount of design/copy edits to allow us to have all of the necessary pieces in place at the appropriate time while keeping a sound bottom-line
  - Continue to fine tune communication plan with special attention to parents, counselors, and transfers
  - Continue to clean and increase efficiency of CRM

- Sent 1,303,447 emails in 2014
        - 54.2% increase in messages sent in 2013
        - 56.6% increase in messages received in 2013
        - 85.3% increase in messages viewed in 2013
        - 77.3% increase in email interaction in 2013
    - Continue to improve quality of our admissions website
      - We have condensed an estimated 50% of our web pages since 2012, and our page views have increased by 13%, meaning fewer pages with more concise content proves to be more effective
      - Visitors are spending on average 30% more time on the website per session than in 2013.
      - High spikes in website activity from social media are most likely attributed to the social media campaigns developed to promote on and off-campus events
        - Between January and March, we had up to 39 visitors per day that accessed our website through social media
8. Revised Student Ambassador program
- Hired a new admissions counselor to assume the point position for our Ambassador Program
  - Intense training for ambassadors
  - Has allowed us to attract the best of the best students on campus for this team
9. We have a highly trained and developed recruitment and operational team of individual who are passionate about education, have an incredible work ethic and demonstrate relationship building skills and provide excellent customer service at all times
- Created an Assistant Director of Marketing and Communications position
    - Position is key in editing/updating/creating publications, managing social media needs, managing admissions website, and managing tele counseling team
  - Created a PEAK position to support Marketing and Communications position
  - Hired two new admissions counselors – one who serves as point for Ambassador Program, and the other to serve as point for group tour management
  - Hired new admissions counselor with a key focus on building relationships with community colleges statewide
10. Campus-wide efforts including faculty calling campaigns that allow prospective students the opportunity to talk with faculty in their major area of study and begin to make the personal connection that is critical to their retention and success at SOU
11. On-campus and off-campus events including but not limited to: Preview Days/Weekends, SOU2YOU events, and Raider Receptions
- Events highlight faculty-student relationships, classroom experiences, and co-curricular opportunities as well as the personal touch that has become the hallmark of an SOU education
  - Feedback from participants is consistently very positive

- Off-campus events have proven to be beneficial in introducing SOU to new markets and provide the high touch and personal attention that students and families are looking for
- 12. Increasing the use and number of tele counselors
  - Created a student Tele counseling Manager position
- 13. Added college fairs in: Colorado, Nevada, Southern California, Idaho, and Washington
- 14. Counselor Fly-In program
  - Very popular with high school/independent counselors
  - Effort to build relationships, expand brand recognition, and influence counselor impressions of SOU
- 15. Admissions-on-the-spot (on-site) admission process
  - Admissions counselors meet with students at select high schools/institutions and offer admission on the spot
- 16. Territory assignments are examined and scrutinized on a regular basis to determine the value of what we are doing and the impact we are having in the respective areas we visit

**Our primary areas of focus have been to increase new student enrollment in the following areas:**

1. Freshmen – targeted student search, coordinated communication plans, geographically targeted outreach, college fairs, high school visits, campus group visits
  - High school students
  - Local and out-of-state students
  - Athletes interested in our athletic programs
    - We collaborate with University Athletics on admission of student athletes
    - We have collaborated on recruitment efforts – an admissions counselor within our offices serves as a liaison with coaches
  - High-achieving academic scholars for our Honor College
  - Striking the right balance between resident and nonresident undergraduate
    - Currently, the overall total university enrollment is at 70.7% resident and 29.3% nonresident
    - At 12 miles from the border and only five hours from northern California’s population centers, SOU is the most conveniently located out-of-state, public university to 13-million northern Californians (more than three times the population of Oregon)
2. Transfers
  - From feeder community colleges
  - Adults seeking degree completion
  - Part-time and full-time interest
  - Better communication for transfer options
    - We have built better communications and messaging surrounding transfer students



- Better utilization of materials such as one-page and/or tri-folds that have been redesigned
- 3. Underrepresented populations – college fairs, high school visits, campus group visits for first generation, multicultural students, AVID, Upward Bound, etc.)
  - Strategies for increasing enrollment of underrepresented students are specific and tailored to each ethnic group
    - SOU’s Academia Latina provides a unique opportunity to cultivate brand loyalty and future enrollment from the growing Latino community of southern Oregon
      - Pirates to Raiders program
      - Latino Family Days
      - Cesar Chavez Conference
        - We have recruiters who have a regular and sustained presence in the schools – from middle school through high school and participate regularly in community events
    - Strategic recruitment of African-American students and their families to visit SOU and the Rogue Valley in order to learn about programs, services, and opportunities
      - Includes an intentional increase in recruitment in urban areas with greater diversity including: Portland, Seattle, San Francisco, Sacramento, and Los Angeles
    - Strong recruitment presence in Hawaii
      - Interest from Hawaiian students and high school counselors continues to grow
    - SOU’s Konaway Nika Tillicum program provides a similar unique opportunity in the Native American community
      - Strategic initiatives for Native American students builds upon the cultural values of strong familial and community relationships
      - We strengthen and build enrollment of Native American students through visits to the reservations of the tribes indigenous to Oregon and the Pacific Northwest
      - Participation in Pow Wows
      - Collaborative relationships with Indian education agencies and home visits
      - We are adding a Native American Recruitment position to further strengthen relationships with tribes and increase enrollment of native students
  - Non-traditional students including:
    - Active or inactive veterans
    - Any first-time college student over the age of 25
    - First generation

- Students with families
- Returning professionals – continuing education
- Any student with a documented learning difference
- We continue to reach across all demographics to enroll students from diverse backgrounds who are prepared to succeed at SOU and beyond, and who will ultimately make a positive difference in the community

## Appendix 2: Identity, Community, & Academic Portfolio

Southern Oregon University's mission is to be an inclusive campus community dedicated to student success, intellectual growth, and responsible global citizenship. We are committed to a challenging and practical liberal arts education centered on student learning, accessibility, and civic engagement. Our academic programs incorporate partnerships, public service, outreach, sustainable practices, and economic development activities that address regional needs such as health and human services, business, education, and outstanding programs that draw on and enrich our unique arts community and bioregion.

### Identity

Southern Oregon University focuses on undergraduate education and combines an emphasis on affordability and access with academic rigor. We balance the traditional liberal arts with applied, hands-on learning that connects students with the people and the issues affecting our communities and our state. Each year, more than 2,000 SOU students are working on internships, capstones, and undergraduate research in our region. Every Honors College student is connected with a mentor in the community and focuses on an applied project. Our House Experiences provide an integrated outcomes-based approach to general education that involves students with agencies, nonprofits, and businesses in southern Oregon. Through a variety of delivery modalities and a scheduling format attuned to the needs of working professionals, the Innovation and Leadership program offered at the Higher Education Center in Medford enables working students to attain a university degree in a cohort model that recognizes credit for prior experience. We also connect these students through internal work opportunities through the PEAK job initiative program, providing professional-level jobs and mentoring.

Another distinctive element is our vertical integration with K-12 and community colleges. Every year, over 1,100 high school students from 20 local schools take SOU classes. We work closely with K-12 leadership on the Southern Success initiative, and our partnership with the Phoenix-Talent school district (Pirates to Raiders). This program along with a similar one under development with the Medford school district (Bulldogs to Raiders) connects Hispanic students and families with SOU students, faculty, and staff to create a pathway to university starting in the 8<sup>th</sup> grade. Our academic programs for Hispanic, Native American, and other middle-school students bring thousands of students onto campus each summer. Our shared building and partnership with Rogue Community College is unique in the United States.

With the more traditional residential campus in Ashland and the Higher Education Center in Medford, SOU offers an outstanding blend of liberal arts and applied programs for our professional workforce.

Our long-term planning includes a significant commitment to Oregon's 40-40-20 goal, and our campuses have the physical capacity to contribute substantially to meet our portion of that goal. We look forward, also, to increased partnership with the other Oregon public universities in providing joint programming in person and online to increase opportunities for Oregonians.

## Community

Established in 1872, Southern Oregon University is the only Oregon public or private comprehensive liberal arts university south of Eugene. SOU's primary service area in Oregon includes 7 counties: Coos, Curry, Douglas, Jackson, Josephine, Klamath, and Lake. SOU is also a primary post-secondary education provider to Siskiyou, Trinity, and Shasta counties in northern California.

The major economic drivers in the southern Oregon-northern California region have been evolving over decades. Once dominated by agriculture and wood products manufacturing, economies are now more diversified with growing viticulture, health care, retail trade, construction, and hospitality industries. The public sector and government - federal, state and local - are often major employers in these counties.

As is true of Oregon's and California's rural areas, the region was hard hit during the recent recession and continues to feel the effects. Employment opportunities and average salary rates lag behind the urban areas of the two states. Population growth in the economic hubs of Medford and Redding is static or slightly increasing; population is declining in most of the small rural communities in the region. The average age throughout the region is about 40. The Hispanic community is the largest growing minority population in the area. According to 2012 census data, of the 25 or older populations in Jackson and Siskiyou counties, 20-25% have earned a Bachelor degree or higher. In Coos, Curry, Klamath, Josephine, Shasta and Trinity counties, 16-20% hold Bachelor degrees or higher. In Douglas county, less than 16% of the population over 25 holds a Bachelor degree or higher.

Serving more than 40,000 square miles, Southern Oregon University contributes significantly to both the economic vitality and the vibrant cultural life of the region. It is one of the largest employers in Jackson County and the largest employer in Ashland. It was central to the founding of the internationally known Oregon Shakespeare Festival and the Britt Music Festival. Our students contribute to the community, providing service in the form of internships, practica, undergraduate research and volunteer work. Nearly half of our students work at paying jobs off-campus.

## Portfolio

SOU offers 36 undergraduate and 11 graduate majors within a portfolio of approximately 150 academic programs; however, these offerings are being reduced over the next three years to more closely align with current student desires and to meet financial goals. Moreover, during our academic reorganization process, programs have created plans to more effectively meet student and workplace needs and priorities.

In the new academic structure, clusters of academic programs are focusing on serving students even more effectively, enabling further interdisciplinary collaboration and increasing the focus on career opportunities. For example, Environmental Studies and Communication has been aligned with the Business program to enhance professional skills and connections with environmental programs, a

hallmark for SOU. Similarly, performing & visual arts has been aligned with emerging media and digital arts, creating a synergy of traditional arts with 21<sup>st</sup> century knowledge and skills.

SOU's accreditations and affiliations include the NWCCU, the TSPC, Accreditation Association of Ambulatory Healthcare (AAAHC), and the Council for Accreditation of Counseling & Related Education Programs (CACREP), American Chemical Society (ACS), and the National Association of Schools of Music (NASM). SOU has articulation agreements with all southern Oregon and northern California community colleges located in the region as well as articulation agreements with most Oregon community colleges.

## Appendix 3 - Economic Impact Assessment

### **Report: An Assessment of Southern Oregon University's Economic Impact on the Local Region**

**Design & Methodology** - This assessment focuses on the impact that Southern Oregon University has on the regional economies of Jackson and Josephine counties. It uses a similar methodology described in Dr. Larry Singell's 2002 report titled A Study of the Economic Impact of the University of Oregon. Dr. Singell was previously a professor of economics at the University of Oregon and in 2011 became the Executive Dean of the College of Arts and Sciences at Indiana University, Bloomington. The data used in this assessment includes SOU expenditures and activities during the 2013 fiscal year; June 2012 through July 2013. A multiplier effect of two (2) has been factored into the analysis to account for the recycling of dollars that occur within the local economy. Many economic impact analyses use multipliers as high as 6 or 7 depending on the industry of the organization. A review of the literature suggested that for university and college organizations a more conservative multiplier of 2 is appropriate.

**Student Impact** - In 2013, an average of 6,000 students attended the university each quarter. Using the standard student budget published by SOU's Financial Aid Office, \$2,685 of discretionary spending for those students living on campus and \$3,252 for commuter students was identified. Additionally commuter students not living with their parents also have a budget for room and board of \$8,625, and \$3,000 for those living at home. All told, these dollars amount to nearly \$50 million in direct student spending for the year. Applying an economic multiplier of 2 to account for the recycling of dollars that occur locally could mean approximately \$100 million is contributed to the regional economy by the student body.

**Employee Impact** - SOU is the twelfth largest employer in Jackson and Josephine counties. Over 700 faculty and staff garnered a payroll of \$36 million from the university during the academic year resulting in a potential economic impact of \$72 million after factoring in the multiplier. Additionally \$6.9 million were paid in health benefits to SOU employees and if two thirds of those dollars are funneled back from the insurance companies into local area health care providers, these dollars result in another \$4.6 million of economic impact.

**Operational Impact** - Southern Oregon University consistently works with and purchases from the local business community as evidenced by \$3.6 million paid out to local vendors and another \$2.4 million paid out in capital project expenditures. In fiscal year 2013 an additional \$35.2 million was spent on the construction of the new student housing complex and approximately 25% of those materials, supplies, and subcontractors were sourced within the local communities. In total these expenditures translate to

nearly \$30 million in economic impact to the region

**Visitor Impact** - SOU's Raider Registration and Preview Days gather approximately 3,650 visitors to the area during the summer months. The graduation ceremony brought an additional 2,400 friends and families of graduating seniors into the area for commencement. Using an estimate of \$250 spent per visitor these events combined to have an economic impact of \$3 million. Other visitors to SOU include over 15,000 attendees at 56 theatre arts performances, 28 concert performances, and 100 museum events. The Division of Continuing Education had 11,000 registrants involved in youth camps, workshops, Osher Lifelong Learning Institute courses, and community education classes during the year. Equating a dollar impact of these additional 26,000 visitors is difficult but even using a very modest estimate of each individual spending an additional \$25 in the local economy during their visit(s) amounts to another \$1.3 million in regional impact.

**Graduate Impact** - Results from the 2013-14 OUS Bachelor Graduates One Year Later Survey show that 70 percent of SOU graduates who secured employment after graduation remained in Oregon and of those, two thirds were employed within Jackson and Josephine Counties. Utilizing the difference in median earnings as cited by the US Census Bureau comparing employees with baccalaureate degrees versus those with high school diplomas, the graduates had the potential to create a local impact of over \$26 million. Many of these locally employed graduates were not working at a professional level utilizing their field of study and therefore garnering lower wages than cited but nonetheless these graduates are staying in the area and contributing to the regional workforce needs. Much of this local employment may be directly attributed to local businesses that are active in SOU's annual career fairs where on average 45 companies attend at least one of four main events. Last year 450 students participated in these fairs. Additionally, our Small Business Development Center, operating in conjunction with the U.S. Small Business Association and SOU's Business program, has assisted in creating 15 new start-ups, translating to 33 new jobs.

## Appendix 4, The SOU Student

Half of SOU students declare undergraduate majors in five areas: Business, Psychology, Education, Criminal Justice, and Performing Arts. The top five graduate degrees are in Education, MBA, Psychology, Theatre Arts, and Business Management.

Transfers from Oregon community colleges have increased from 193 in 2006 to 567 in 2014, nearly a 200% increase. A majority of these transfers result from our partnership and shared building with Rogue Community College. Similarly, transfers from participating community colleges in California (College of the Siskiyous, College of the Redwoods, Shasta College) have been increasing steadily.

Our students face financial challenges while at the same time 60% are first generation students within their family to attend college. In 2013-14 about 84% of SOU students graduated with an average debt of over \$25,000. 54% of our admitted undergraduates received a Pell Grant with a normal disbursed amount of \$1850/term or \$5,550/year. 65% of our Federal Application for Student Assistance (FAFSA) filers had an expected family contribution of less than \$5,000. The financial aid office disbursed over \$47.6 million in aid, equivalent to \$28 million in Federal Direct Student Loans, \$3 million in Federal PLUS

Loans, \$9.3 million in Pell Grants, \$1.6 million in Oregon Opportunity Grants, and another \$5.7 million in additional private scholarships and remission programs.

We have seen a steady increase in FAFSA filers, 17.5% from 2010 to 2012. In that same period, Financial Aid (grants, loans, work study) has increased 20% from \$41.5M in 2008-09 to \$49.5M in 2011-12 (an increase of \$8M). During the same years, tuition and fees for resident undergraduate students increased 26%.

Retention rates for first-time full time freshmen increased steadily from 62.0% in 2006 to 70.5% in 2010 and most recently 73.6% in 2014. Sophomore transfers retain at 75% and junior transfers at 82.5%. The average retention rate for all admitted undergraduates is 75%.

Six-year graduation rates for new freshman cohorts dropped from a high of 40% in 1999 to a low of 31% for the 2003 and 2004 cohorts. SOU's 2008 first-time, full-time, freshmen cohort reveals a graduation rate of 40%, which rises to over 50% when including those students who completed their degree at any of the Oregon public universities. The graduation rate of all admitted undergraduate students' stands at 61%. Additionally, the OUS Factbook reports that students who have transferred into SOU with an Associate degree have an 85% graduation rate, the highest among all of the Oregon public universities.

The number of students that have an identified disability has increased from 245 in 2005 to 441 in 2013, an 80% increase. With an effective Disability Resource services office and very strong support systems these students are retaining at a rate of 88%, 13 points higher than the admitted undergraduates without a disability and 20 points higher than the new freshman cohort. Also, admitted undergraduate Hispanic and African American students retain at 77% while students engaged in the Success at Southern TRIO program retain at 85%. This suggests that these outreach activities, focusing on a variety of diverse student populations, are very effective at keeping students enrolled.

Current data from the National Survey of Student Engagement (NSSE) indicate that SOU exceeds national benchmarks in a number of key areas: for example, 84% of our students indicate they are satisfied with their overall educational experience; 74% state that SOU places substantial significant emphasis on academics.

Student surveys have shown that SOU students suffer significant stressors, many of them financial. Most of our students hold jobs on or off campus. As the average age of our students is 26, many of them have family responsibilities and also balance jobs and academic responsibilities. Medical withdrawals have increased and, similarly, appointments with mental health counseling have increased.

## Appendix 5 - Investment Calculations

The total investment of \$38,378 comes from a 4 year average state appropriation per UG resident FTE (source: OUS, Doug Botkin) added to the 4 year average tuition paid per UG resident FTE (calculated off of the official fee books using a 15 hour credit load) and then multiplied by 4 to represent a 4 year time period to complete the degree.

The gap is the difference between the total investment amount and the 4 year average cost to educate one FTE student times 4 years (source: OUS, Doug Botkin).

	<b>SOU</b>	<b>OIT</b>	<b>WOU</b>	<b>EOU</b>
Invested Dollars in 4 Yr Degree	\$38,378	\$54,011	\$38,829	\$43,240
Cost to Educate a 4 Yr Degree	\$41,474	\$54,882	\$40,164	\$43,815
<b>Gap (investment minus cost)</b>	<b>&lt;\$3,096&gt;</b>	<b>&lt;\$871&gt;</b>	<b>&lt;\$1,335&gt;</b>	<b>&lt;\$575&gt;</b>
4 Yr Avg State Appropriation per UG Res FTE	\$4,593	\$7,949	\$4,273	\$5,585
4 Yr Avg Tuition* per UG Res FTE	\$5,001	\$5,554	\$5,434	\$5,225
4 Yr Avg Cost to Educate per FTE	\$10,369	\$13,721	\$10,041	\$10,954

\*Tuition amounts based on "non-promise" rates

## Appendix 6: Degree Quality & Value

As stated earlier the 2013-14 "Bachelor Graduates One Year Later" survey show that 70% of our student graduates remain in Oregon to work. Our graduates make up significant percentages of the professional workforce in southern Oregon—such as teachers, business leaders, health care professionals, and criminal justice professionals. They are generally employed in the following areas: 48% private/for-profit (non-healthcare); 8% health care; 9% education (3% K-12 and 6% postsecondary); 16% local/state/federal government; and 13% non-profit. Our nationally recognized Theatre program attracts more Portland-area and out-of-state students than the other top majors. Over 90% of the Theatre graduates that we have tracked are employed in professional-level positions around the country.

Every educational program at Southern Oregon University has articulated student knowledge, skill, and disposition outcomes for graduates in their programs. Those outcomes are entered into our assessment tracking database along with how those outcomes will be measured. The NWCCU, our accrediting organization, recently commended SOU for our academic program assessment practices.

The University Seminar (USEM), our year-long freshman seminar, has provided the institution with the most evidence that assessment of student achievement leads to the improvement of teaching and learning. Over the years the USEM program has collected diagnostic data that have been used by its faculty to modify the curriculum. USEM faculty members designed a diagnostic essay assessment tool to be embedded in all sections of USEM at the beginning and end of the year. Data from the diagnostic essays are used to monitor individual student achievement; included is a pre-assessment to use in the design and implementation of each section of USEM.

Achievement data from these diagnostic essays are also used to guide professional development for USEM faculty and to monitor student achievement longitudinally. In addition, these embedded assessments also provide institutional baseline data in the following areas: (1) use of standard English, (2) writing organization, and (3) the construction of logical arguments (a type of critical thinking that is used across all disciplines).

Similar efforts are underway for the University Senior Capstones in which assessment rubrics for the foundational learning outcomes of Critical Thinking, Communication, and Information Literacy will be used by the University Assessment Committee to score a random sample of capstone papers. During this process, the rubrics will be refined as papers from numerous majors are scored and analyzed. This analysis will serve to inform future large scale collection efforts of senior capstones.

The Collegiate Learning Assessment (CLA) is another source of large-scale data that has been collected to situate SOU on a national context. As noted earlier in this report, the value-added measure within the CLA indicate that SOU's seniors were in the 98th percentile compared to all four-year colleges and universities that administered the CLA in 2012. This value-added measure indicates that, after four years of college education, SOU seniors perform significantly better in critical thinking and writing skills than is typical for seniors from schools admitting similar students.





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TO: Roy Saigo, Interim President, Southern Oregon University

FROM: David Yaden, Chair, State Board of Higher Education  
Cathy Dyck, Acting Chancellor, Oregon University System

DATE: December 19, 2014

## **GUIDELINES FOR "CONDITIONS"**

### **Introduction**

The "Conditions Recommended by the State Board of Higher Education for Institutional Governing Boards at EOU and SOU" require an initial Mission Review:

The State Board of Higher Education and Chancellor's Office, from now through June 30, 2015, will work with the EOU and SOU administrations and in consultation with appointed, but not serving, institutional board trustees as possible, to clarify and strengthen their mission, to develop strategies to foster a competitive niche within the institution's mission, and provide a pathway towards long-term financial viability. These strategies should include the unique role of these institutions in meeting the state's 40-40-20 goal, aligning with regional economic development needs, and supporting the Higher Education Coordinating Commission's strategic priorities.

No particular document or report or outcome is specified. Based upon consultation with the HECC, the Chancellor and the State Board of Higher Education intend to submit a report encompassing the topics specified above to the HECC as of June 30, 2015. The report will serve as a commentary and handoff document to assist the institutions, their new boards and the HECC in preparing for the "second review" of the conditions due by December 30, 2015.

The "second review" requires that

By December 31, 2015, on behalf of the EOU and SOU Boards of Trustees, the respective Presidents shall present to the HECC an interim progress analysis on:

- Mission refinement;
- Program rationalization;
- Contribution towards 40-40-20; and
- Financial stability progress and trajectory.

HECC "strategic priorities" are:

- a. Broaden the pathways to our 40-40 goals
- b. Make the pathways accessible, affordable and supportive for students
- c. "Steer" the higher education enterprise

d. "Cheer" the promotion of college completion and career readiness

HECC will be working with the institutions to clarify their roles and goals around these priorities. Therefore, there is no need in this initial review to address them specifically.

With regard to 40-40-20, HECC is engaged with the institutions in refining student outcome metrics presently contained in the achievement compacts. This initial Mission Review asks about the "unique role" of the institution in meeting the goal – an invitation for a more mission-focused commentary than a set of metrics.

Southern Oregon University is in the process of implementing a financial retrenchment plan. That plan will address some but not all that is required by the "Conditions."

At the same time, the history of previous unfulfilled or partially fulfilled planning efforts begs the question: how will this time be different? That, too, should be part of the report to HECC.

## **Process**

### **January 9, 2015 State Board meeting**

Presidential commentary on these instructions and Board discussion (30 minutes)

### **April 10, 2015 State Board meeting.**

Update by institution and discussion

### **May 5, 2015 institution submits report to Chancellor**

Basis for Mission Review report by State Board

### **June 5, 2015 State Board meeting**

Adoption of Mission Review report (Report to be drafted, in consultation with institution, by Chancellor and working group of the Board appointed by the Chair.)

## **Mission Review report outline**

The institutions are asked to provide a narrative with supporting evidence of what they are doing to:

- clarify and strengthen mission
- foster a competitive niche
- provide a pathway to long term financial viability

Particular attention should be given to the region-serving role of the institution in all its facets.

The report should incorporate the following, not as comprehensive reports in themselves rather as they elucidate the overall narrative.

### **Overview of institutional situation**

Using the traditional categories of strengths, weaknesses, opportunities and threats, summarize the situation of the institution.

### **Overview of institutional identity (“competitive niche”)**

Identity is here taken to be a broader concept than mission or, especially, mission statement. It attempts to get at the heart of ultimate goals (mission) and how the institution goes about doing its work. It is particularly attentive to what distinguishes an institution (results not words), attentive to the markets it serves and its competitive position, and attentive to its capacity to invest in its strengths and to say “no” to the peripheral.

To the extent there are distinct aspects or emphases within the mission, comment on how these relate to each other and how priorities are set among them.

### **Enrollment and completion**

What do enrollment and completion profiles and trends tell about mission fulfillment and long-term economic viability? (Consider geography, demography, enrollment status, tuition category, financial aid status, admission source.) Your institutional target metrics should be a part of this discussion.

### **Program alignment**

Alignment of program with mission, markets and long-term financial viability (including net revenue generation and your financial metric targets discussion). Identification of program opportunities and any barriers to pursuing them. This should build on work done through the Provost’s Council but go beyond the portfolio framework of that work to a more diagnostic focus on the institution.

### **Long-term financial viability**

Summarize the analysis and forecasts done through retrenchment. Considering the variability of enrollment and state funding over the last decade, how will the institution handle such variability in the future. In particular, variability in enrollment can be very disruptive of faculty and financial management.

Southern Oregon University has pursued becoming a “destination campus,” “the public liberal arts college of the West” at the same time it plays a central role serving the communities and students of the region. Given resource constraints, how does it balance these and set priorities between them?

**Adjourn**