Southern OREGON UNIVERSITY

OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

October 13, 2022

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

FROM: Sabrina Prud'homme, University Board Secretary

RE: Notice of Regular Meeting of the Academic and Student Affairs Committee

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

Topics of the meeting will include a provost's report including updates on the Provost's Council, the Transfer Council, and other general updates. There will be a vice president's report including the enrollment management dashboard, an Enrollment Council update, and other general updates. Other items on the agenda include updates on revenue enhancement work in academic and student affairs; curriculum, cost management efforts, and the university's Fall 2022 enrollment including an enrollment overview. There will be a discussion of the value of higher education and student mobility including information on career focus and post-graduation outcomes.

Action items include a proposed 2023-2024 meeting schedule and a consent agenda consisting of meeting minutes.

The meeting will occur as follows:

Thursday, October 20, 2022
12:00 p.m. to 3:30 p.m. (or until business concludes)
Meese Room, 3rd Floor, Hannon Library
Members of the public may view the proceedings at https://sou.zoom.us/j/83608489306 at the time of the meeting.
Materials for the meeting are available at governance.sou.edu.

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

Public Comment

Members of the public who wish to provide public comments for the meeting are invited to sign up to speak or to submit their comments in writing at least 24 hours in advance of the meeting to the Board of Trustees email address: trustees@sou.edu. Public comments also may be delivered by hand or mailed to SOU Board of Trustees, 1250 Siskiyou Boulevard, Churchill Hall, Room 107, Ashland, OR 97520.

Board of Trustees
Academic and Student Affairs Committee Meeting
October 20, 2022

Call to Order / Roll / Declaration of a Quorum

Board of Trustees
Academic and Student Affairs Committee Meeting

Thursday, October 20, 2022
12:00 p.m. – 3:30 p.m. (or until business concludes)
Meese Room, Hannon Library, SOU Campus
Zoom: https://sou.zoom.us/j/83608489306

AGENDA

Persons wishing to provide public comment in the meeting or in writing may sign up at trustees@sou.edu.
Please note: times are approximate and items may be taken out of order.

	1	**Call to Order/Roll/Declaration of a Quorum**	Chair Jonathon Bullock
	1.1	Welcome and Opening Remarks	
	1.2	Roll and Declaration of a Quorum	Sabrina Prud'homme, SOU, Board Secretary
	1.3	Agenda Review	Chair Bullock
	2	**Public Comment**	
5 min.	**3**	**Consent Agenda**	Chair Bullock
	3.1	April 21, 2022, Minutes	
	3.2	May 10, 2022, Minutes	
	3.3	June 17, 2022, Minutes	
15 min.	**4**	**Provost's Report**	Dr. Susan Walsh, SOU, Provost and Vice President for Academic Affairs
	4.1	Organizational Updates	
	4.2	Update on Academic Affairs Retreats	
	4.3	Provost's Council Update	
	4.4	Other General Updates	

Southern Oregon University
Board of Trustees
Academic and Student Affairs Committee Meeting
Thursday, October 20, 2022

AGENDA (Continued)

10 min.	**5**	**Vice President's Report**	Dr. Neil Woolf, SOU, Vice President, for Enrollment Management and Student Affairs
	5.1	Enrollment Dashboard and Completions Update	
	5.2	Enrollment Council Update	
	5.3	Other General Updates	
	6	**Action, Information and Discussion Items**	
10 min.	6.1	Curriculum Update	Dr. Susan Walsh
15 min.	6.2	Enrollment Overview and Fall 2022 Update	Dr. Neil Woolf
40 min.	6.3	Value of Higher Education and Student-Mobility	Dr. Neil Woolf
		6.3.1 Career Focus and Post-Graduation Outcomes	Dr. Carrie Vath; Dr. Sherry Ettlich, SOU, STEM Division Director
		6.3.2 National Society of Leadership and Success	Dr. Carrie Vath; Danielle Mancuso, SOU, Career Connections Graduate Assistant
40 min.	6.4	Cost Management Updates	Dr. Susan Walsh; Dr. Neil Woolf; Matt Sayre, SOU, Director of Athletics
20 min	6.5	Update on Revenue Enhancement Work in Academic and Student Affairs	Dr. Matt Stillman; SOU, Assistant Vice President for Enrollment Management and University Registrar; Josh Lovern, SOU, Director of Budget and Planning
5 min.	6.6	Proposed Committee Meeting Schedule (Action)	Chair Bullock

Southern Oregon University
Board of Trustees
Academic and Student Affairs Committee Meeting
Thursday, October 20, 2022

AGENDA (Continued)

5 min.	6.7	Future Meetings	Chair Bullock
	7	**Adjournment**	Chair Bullock

Public Comment

Consent Agenda

Board of Trustees
Academic and Student Affairs Committee Meeting
Thursday, April 21, 2022

MINUTES

Theme: Increasing Access

Call to Call to Order/Roll/Declaration of a Quorum
Chair Jonathon Bullock called the meeting to order at 12:06 p.m. Trustee Bullock welcomed the everyone to the spring meeting and thanked presenters and guests.

Board Secretary Sabrina Prud'homme called the roll and a quorum was verified.

Committee Members:

Daniel Santos	Present	Steve Vincent	Present
Jon Bullock	Present	janelle wilson	Present
Debra Lee	Present	Barry Thalden	Present
Deborah Rosenberg	Present		

Other trustees in attendance: Lyn Hennion, President Rick Bailey

Public Comment
No members of the public provided comments.

Consent Agenda (Action)
Board Chair Santos moved to approve the consent agenda as presented. Trustee Vincent seconded the motion and it passed unanimously.

Provost's Report
Provost's Council
Provost Walsh reported on the Higher Education Coordinating Commission's (HECC) support to increase the Public University Support Fund to a level that keeps a tuition increase below 5 percent and that there is every intention of keeping strong start programs like the Bridge Program in place.

Transfer Council
Provost Walsh said that SOU continues working with other schools to help host an articulation summit semi-annually to increase collaboration and transfers among community colleges and Oregon's public universities. She later added that a main driver for the statewide group is common course numbering for community colleges and the public universities. More updates will be provided.

Other General Updates
Dr. Walsh updated the committee on changes in the academic organizational structure. To be more efficient with resources and after many discussions with faculty and staff, the decision was made to eliminate the Division of Humanities and Culture. This division is much smaller with fewer faculty and less in student full-time equivalencies (FTE). It will be dissolved at the end of this term and the programs will be moved to other divisions. This will lead to good synergies and efficiencies will be realized.

Regarding the general education, Provost Walsh said the task force continues its work toward

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implementing the new general education curriculum in the fall of 2023. The work is on track and Andrew Gay, who has been leading the charge, will update trustees at a future meeting.

Vice President's Report

Enrollment Management Dashboard and Enrollment Council Update

Dr. Neil Woolf presented the enrollment management data, which are following fairly normal trends from the fall to winter term, and he reviewed the fall 2022 admissions funnel report. Discussion ensued regarding out-of-state students and efforts to reach students across the country and world to compete in the online education space.

Action, Information and Discussion Items (Action)

Curriculum Update

Provost Walsh provided several updates on curricular items, highlighting that the new major in sustainable tourism management, which the committee recently approved, was approved at the HECC last week so SOU has a new major. Another new major is moving forward in music industry and production studies and a special meeting of the committee may be necessary to approve it. In June, she expects to bring forward new certificate programs in restorative justice and sports and recreation management.

New Program Proposal: Certificate in Environmental Communication

Dr. Erik Palmer discussed the new program proposal for a Certificate in Environmental Communication, as presented in the materials.

Trustee Thalden moved to approve the proposal. Board Chair Santos seconded the motion. The motion was approved unanimously.

Tuition and Fees Affordability

The team of vice presidents Walsh, Woolf, and Perkinson led the committee in a discussion about the tuition and fees recommendation, especially affordability, as well as the factors influencing the recommendation and the process underlying these.

Regarding the Tuition Advisory Council (TAC), the chair of the council, Provost Walsh, reviewed the composition of the TAC, explained the committee met eight times this year for two hours each meeting, and completed each item on the TAC process checklist, which is available online with the meeting minutes. She praised Josh Lovern his work educating the students on the budgets, how revenue and expenses work, and the heavy lifting of the process. The TAC then made a recommendation to the president, which was unanimous.

Greg Perkinson praised the students' work and their process in developing the student fees. Dr. Walsh walked the committee through the extensive set of materials focused on mandatory enrollment and incidental fees. The total cost of attendance including housing and meals was presented and the composite tuition and fees increase was 4.73 percent. Vice President Woolf highlighted tuition affordability programs such as remissions and financial aid leveraging. Dr. Walsh explained that the TAC had important philosophical discussions about equity and that the affordability measures are geared toward this.

Open Educational Resources (OER)

Dale Vidmar, university librarian, discussed OERs as an additional strategy to reduce costs for students and shared SOU's plan. He said OER grants at SOU since 2015 have saved 6,294 students an estimated $1,278,642.90, representing $14.39 per program dollar spent. The goal

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is that 25 percent of the courses requiring materials will use no or low-cost materials by fall 2024.

SOU Educator Equity Plan (Action)
Chair Santos noted that pursuant to ORS 342.447 (amended by HB 3365), SOU is required on a biennial basis to prepare written plans that detail the recruitment, selection, retention, and graduation of diverse educators. The board is asked to review these plans for adequacy and feasibility. Following the committee's action and recommendation to the board, the plan will be forwarded to the HECC.

Dr. King discussed the continuing plan with the committee, as presented in the extensive materials. He focused on key differences in this year's plan, measures of success, and the current program results.

Board Chair Santos moved to approve the plan as presented and to recommend it to the full board for adoption. Trustee wilson seconded the motion and it passed unanimously.

Addition of New Athletic Sports
Introducing the topic, President Bailey praised Matt Sayre, Director of Athletics, following their recent National Association of Intercollegiate Athletics conference, and said he wants trustees to think about athletics as an enrollment mechanism underway to bring more students and student athletes to SOU. Director Sayre explained, the university is looking to bring four new sports to campus in 2022-23 including women's cheer/dance; women's beach volleyball; men's and women's cycling; and men's and women's golf. Director Sayre and Vice President Woolf presented enrollment concepts behind new sports, expected enrollment impacts, and the diversity recruitment and retention model in athletics.

Enrollment Marketing Dashboards
SOU's Marketing Director, Nicolle Aleman, shared some of the tools the subcommittee uses to assist with enrollment process. She reviewed an institutional strategy including social media, dashboards and reporting, digital advertising, and provided a live demonstration of the tools used. Ultimately, she said the work is data driven marketing and she discussed how they can measure returns on investment.

Re-Imagining of SOU-Community College Partnerships
With a constant eye toward collaboration, enrollment, and growing SOU's transfer student population, Dr. Woolf and President Bailey have been on a community college tour to help create and solidify new partnerships to ensure student success and graduates. They discussed how well these visits have been going, the progress they've been able to make so far, why these partnerships are important to SOU and its students, and goals to connect with all 17 community colleges in Oregon.

Future Meetings
Chair Bullock said the next meeting of the Academic and Student Affairs Committee meeting will take place on Thursday, June 16, 2022. He asked that if any trustee on the committee has any topics they'd like to see on a future agenda, please send them to the Board Secretary.

Adjournment
With no further business proposed, Chair Bullock adjourned the meeting at 3:24 p.m.

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Board of Trustees
Academic and Student Affairs Committee
Special Meeting
Thursday, May 10, 2022

MINUTES

Call to Call to Order/Roll/Declaration of a Quorum

Chair Jonathon Bullock called the meeting to order at 2:31 p.m. Chair Bullock thanked trustees for coming together for the special meeting. He thanked presenters Dr. Keller and Terry Longshore, both faculty of the music department, for their attendance as well.

Board Secretary Sabrina Prud'homme called the roll and a quorum was verified.

Committee Members:

Daniel Santos	Present	Steve Vincent	Present
Jon Bullock	Present	janelle wilson	Present
Debra Lee	Present	Barry Thalden	Present
Deborah Rosenberg	Present		

Other Trustees in Attendance: President Rick Bailey

Land Acknowledgement

Provost Susan Walsh read the SOU Land Acknowledgement.

Public Comment

No members of the public provided comments.

Action, Information and Discussion Items

Chair Bullock reminded the committee that the board delegated the responsibility of curriculum approvals to the Academic and Student Affairs Committee. Dr. Derek Keller and Terry Longshore discussed the proposed certificate program for the Bachelor of Arts/Bachelor of Science in Music Industry and Production Studies. Dr. Keller was charged with developing a curriculum and he has started new audio and music production courses; he noted that ensembles have doubled in size. To have industry in the title of the program requires a certain number of classes such as business and industry economics. The major has a fairly high number of professional credits because it has the music and business requirements. The new program is expected to help with student recruitment as well as retention.

President Bailey commended Longshore and Keller for their innovation and leadership. He stated that these very specialized, exciting pathways help set SOU apart and get more recognition regionally, nationally, and beyond. Dr. Keller further discussed collaboration such as grants and donors and with Jefferson Public Radio. Questions and discussion ensued regarding the program, curriculum, faculty, and other factors related to the development of the program.

Trustee Thalden moved to approve the Bachelor of Arts/Bachelor of Science in Music Industry and Production Students. Trustee Lee seconded the motion and it passed unanimously.

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Future Meetings

Chair Bullock announced that the next regularly scheduled meeting of the committee is scheduled to take place at noon on June 16.

Adjournment

With no further business proposed, Chair Bullock adjourned the meeting at 3:04 PM.

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Board of Trustees
Academic and Student Affairs Committee Meeting
Thursday, June 16, 2022

MINUTES

Theme: Responsiveness to Students - From Access to Success

Call to Call to Order/Roll/Declaration of a Quorum

Chair Jonathon Bullock called the meeting to order at 12:01 p.m. He welcomed trustees as well as presenters and special guests. A special welcome was offered to Dan DeNeui; Andrew Gay, Zac Olsen, Joel Perkins, Dr. Matt Stillman, and Carrie Vath, who attended to support the committee's discussions. Chair Bullock gave a special thanks and congratulations to Dr. Stillman and the university-wide team that helped deliver SOU's first in-person commencement since 2019.

Board Secretary Sabrina Prud'homme called the roll and a quorum was verified.

Committee Members:

Daniel Santos	Present	Steve Vincent	Present
Jon Bullock	Present	janelle wilson	Present
Debra Lee	Present	Barry Thalden	Present
Deborah Rosenberg	Present		

Other Trustees in Attendance: President Rick Bailey

Public Comment

Dani Brodie, current chapter chair of the OSPIRG student organization, joined the meeting via Zoom. They informed the committee of OSPIRG's focus on environmental and social justice issues describing several projects. The group was defunded by the Student Fee Committee; Dani asked that the trustees consider a budget that includes OSPIRG and requested help with funding the organization.

Consent Agenda (Action)

Due to capacity issues, there were no minutes to approve.

Provost's Report

Provost Sue Walsh informed the committee that Lane Community College is putting forward applied baccalaureate degrees in nursing, business, and child development/education and expressed concerns on the matter. Provost Walsh plans to talk with the divisions regarding this and the possibility of offering associate degrees. Discussion followed regarding the role of the Higher Education Coordinating Commission (HECC) and whether students' needs are being met.

She noted that the statewide Provost's Council continues to review legislative concepts. Provost's would like to see state monies follow the student to any post-secondary institution for Oregon Promise grants and see Oregon Opportunity Grants increase base funding levels as well as tier awards. The HECC and others are on board. She noted further that the Native American College Access Program is moving forward to the legislature and Strong Start funding will continue into the next biennium, which affect's SOU's BRIDGE program.

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Provost Walsh shared that Governor Brown has allocated $200 million for the Career Ready Oregon programs and $95 million is slated for workforce-ready grants to support paid work experience, work programs, tuition and fee assistance, and other activities such as career pathways work. SOU can and will start looking at and applying for these grants.

Vice President's Report
Vice President for Enrollment Management and Student Affairs, Dr. Neil Woolf, was excited to talk about the Raider Academic Awards and welcome the Top Student Leader, Erin Wright and her husband, Brian. Dr. Woolf read the complimentary statement that was read during the awards ceremony regarding Erin's work in starting and running a student club for students to discuss and receive peer support with mental health.

He also reviewed the enrollment management dashboard and completions update, as presented in the materials; he clarified the difference between degrees awarded and students who applied for graduation.

Action, Information and Discussion Items
Curriculum Update
Certificate in Restorative Justice (Action)
Associate Provost, Dr. Dan DeNeui provided a brief overview of the certificate program as well as background on the need for transformation in criminal justice programs and approaches, citing a significant enrollment decline in criminal justice programs after the George Floyd incident. Courses that are foundational to the criminal justice program are included in the certificate and courses with an additional restorative justice focus are required. SOU will be the first university in the state to offer such a program.

Trustees asked about recruitment within and from other current majors, workforce opportunities, concerns about the duration of time needed to complete the certificate, and applicability of the certificate to other disciplines such as education and higher education.

Trustee Santos called for a motion to approve the Certificate in Restorative Justice. Trustee Thalden seconded the motion. The motion was approved unanimously.

Certificate in Sport and Recreation Management (Action)
Joel Perkins, Chair of Health and Exercise Science and instructor in the department, provided a brief overview of the certificate program, as proposed. Trustees sought clarity on workforce applicability what sports officials do, exactly.

Trustee Santos called for a motion to approve the Certificate in Restorative Justice. Trustee Vincent seconded the motion. The motion was approved unanimously.

Minor in Marketing
Provost Walsh informed the committee that SOU is leveraging the coursework it offers to provide new options for students by creating this minor in marketing, the in-depth proposal for which, was included in the meeting materials. Trustees asked how complementary the minor was expected to be to students in other departments and about the possibility that offering the minor would increase full-time equivalency (FTE); the university does expect these outcomes. Provost Walsh reminded the committee that trustees do not need to approve new minors.

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Bachelor of Arts/Bachelor of Science in Music Industry and Production Studies
Provost Walsh provided an update on this program that was approved at the committee's special meeting in May. The HECC approved it; so, SOU will be offering the new program in the fall of 2022. She thanked trustees for their support.

General Education Task Force Update
Andrew Gay provided an overview of SOU's general education (GenEd) transformation, as it applies to strategic directions one and four of the university's strategic plan. Some objectives of the GenEd Task Force's work have been to reduce credit requirements, make learning goals and requirements more transparent and purposeful for students; make GenEd more attractive to prospective students; and to ensure maximum transferability of credits. Gay explained how shifting from discipline-focused outcomes to skill-based capacities with student-focused outcomes will improve the student experience, increase equity and access, and prepare students for the workforce. Gay highlighted the progress and accomplishments including professional development of more than 70 faculty and the development of 92 courses with 25 more in the pipeline. He outlined the next steps in preparation for launch.

Trustees discussed the representation of programs across the disciplines, better real-world applicability of the capacities to the needs of the students, representation of student work through the portfolios, and offered overall commendation for the transformation.

Student, Faculty, and Staff Affinity Groups
Drs. Stillman, Vath, and Woolf discussed the work of the affinity groups to support the recruitment and retention of students as well as faculty and staff, and discussed data on the students, as presented in the materials. They talked with different groups to find out their specific needs/wants as well as with staff who could volunteer to serve on these groups. Mentorship and training were common themes among these groups, both with peers and faculty/staff. As a result, affinity groups have been created for American Samoan, Latin-X, Black/African American, Native American, and Asian/Pacific Islander students.

Trustees discussed mentoring, tribal outreach, student retention, suggestions for including Eastern Oregon residents, and LGBTQ+ as groups.

EAB's Navigate: Update on Retention
Provost Walsh and VP Woolf updated the committee on the use of EAB's Navigate and how it is helping SOU with retention. Currently 78 percent of students and 82 percent of faculty use Navigate. They discussed the data that those who attended Navigate campaigns retained at rates higher than those who did not and versus SOU overall.

Data Sharing Agreements
Chair Bullock shared the importance of the data sharing agreements with local and regional high schools and school districts. The chair framed the item by noting the gap that exists between K-12 and higher education, and that high school graduation and college preparation are not one and the same. VP Woolf defined these agreements, presented the benefits to the students, school districts and SOU. Currently, agreements have been signed with Medford School District, Ashland School District, Grants Pass School District, and Redmond Proficiency Academy. Invitations have been extended to Phoenix-Talent School District and Eagle Point School District. There are active discussions with Portland Public Schools, Central Point School District and Roseburg Public Schools. Admissions Director Zac Olsen discussed the next steps in the data sharing process as well as targeted communications.

Trustees discussed the importance of ethicality in these programs; concerns about inundating students with email, pressuring students, and ability to opt out. They also discussed budget, best practices, improving access to higher education, and tracking ROI.

Student-Centered Statewide Discussions

President Bailey spoke of the statewide higher education discussions taking place in the state. The Oregon Council of Presidents and the Oregon Community College Association partnered with the National Center for Higher Education Management Systems (NCHEMS) to analyze higher education in the state in terms of collaborative efforts between institutions, serving underrepresented populations, and other areas. The Student Voices Task force is a legislative task force that will come to SOU in July to get the student perspective. He later added that in the NCHEMS discussion, it was noted that state investment in higher education is the same as it was 20 years ago; Oregon ranks in the 40's terms of the 50 states' funding contributions to higher ed; and Oregon ranks 43rd in the nation for high school students that go directly into higher education. With these numbers, the state needs to drive the strategy for higher ed and this should be a wakeup call.

Jeanne Stallman explained that the NCHEMS work and the task force are running parallel with work HECC is doing. The three of these will come together to inform the legislative session and hopefully all point in the same direction on where the state needs to go.

Future Meetings

Chair Bullock announced the next regularly scheduled meeting of the committee is scheduled to take place at noon on Thursday, October 20.

Adjournment

With no further business proposed, Chair Bullock adjourned the meeting at 2:55 PM.

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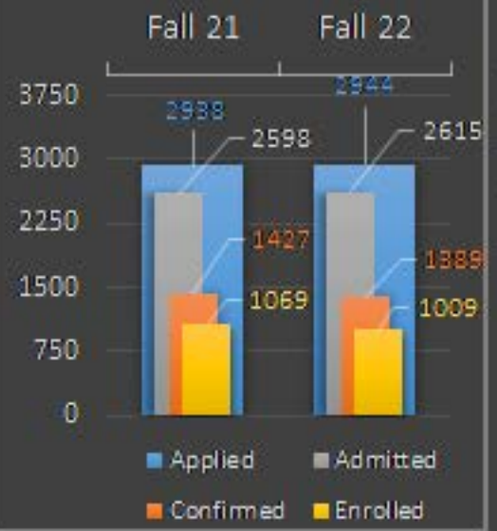
Provost's Report

Vice President's Report

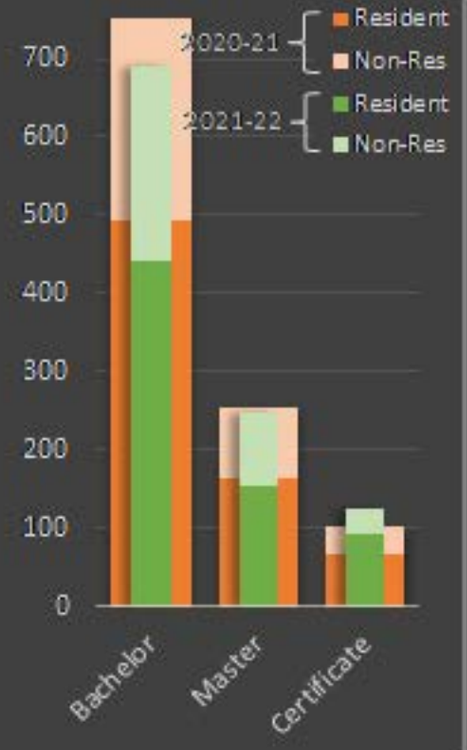
Admission Funnel

3 week after start of term



Degrees Awarded

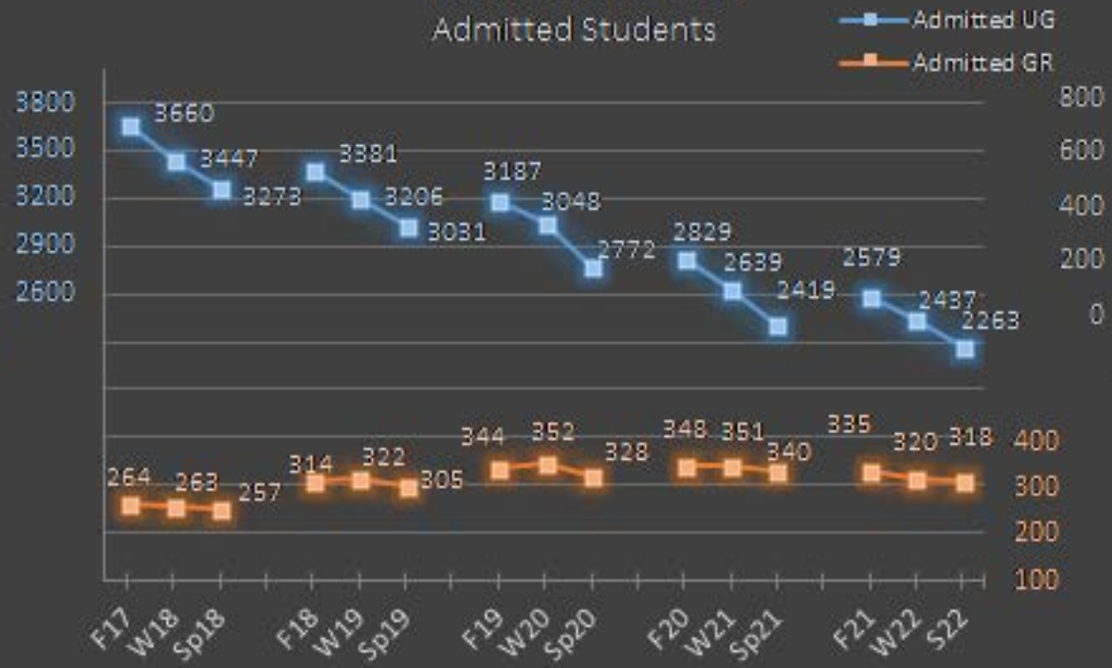
End of September



All charts updated on 10/10/2022.

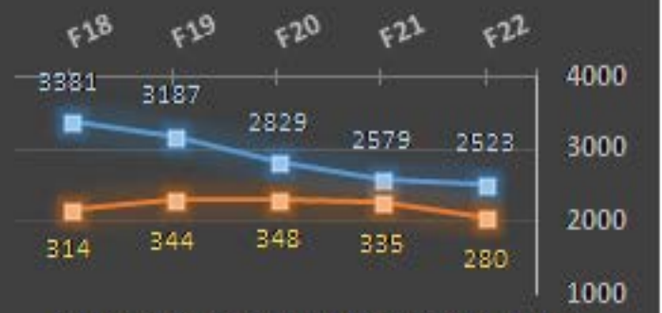
Academic Year FTE

Admitted Students



All data as of end of term.

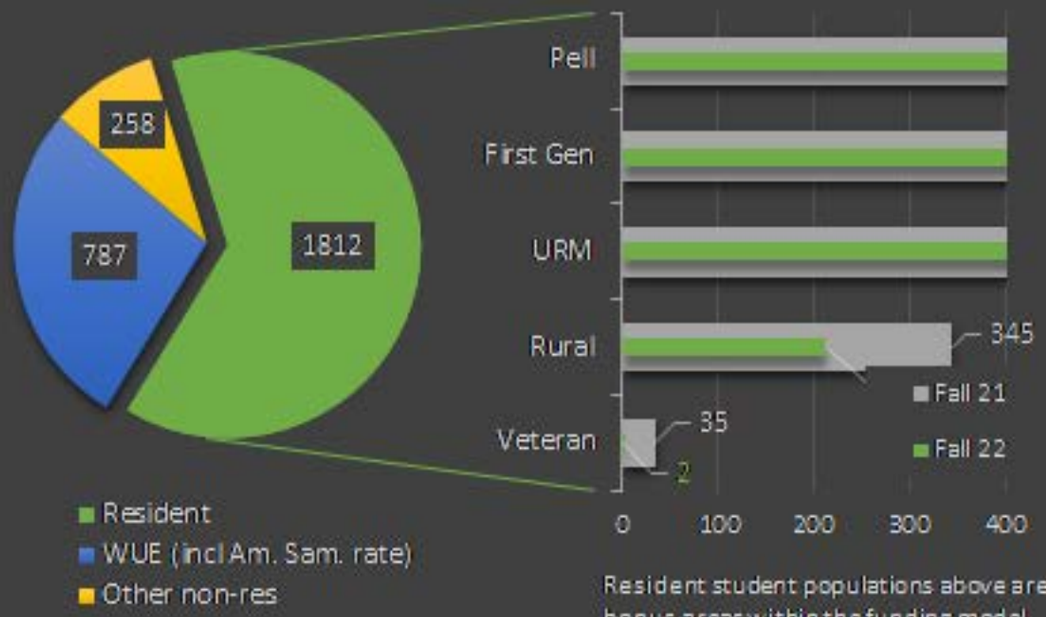
Summer FTE



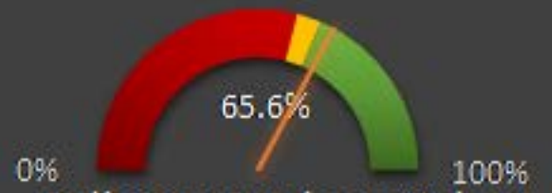
F22 as of 2 weeks in. All other data as of EOT.

Fall 22 Admitted UG Students

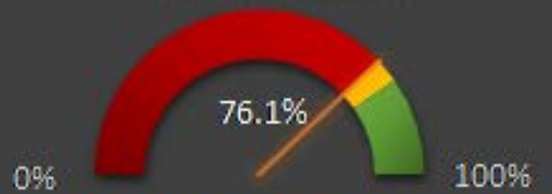
Week 3



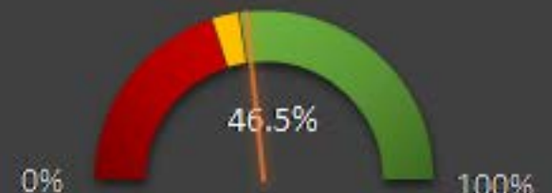
Resident student populations above are bonus areas within the funding model.



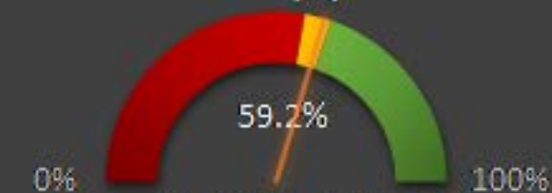
Full-Time Freshman Cohort Fall Retention



All Undergrads Fall Retention

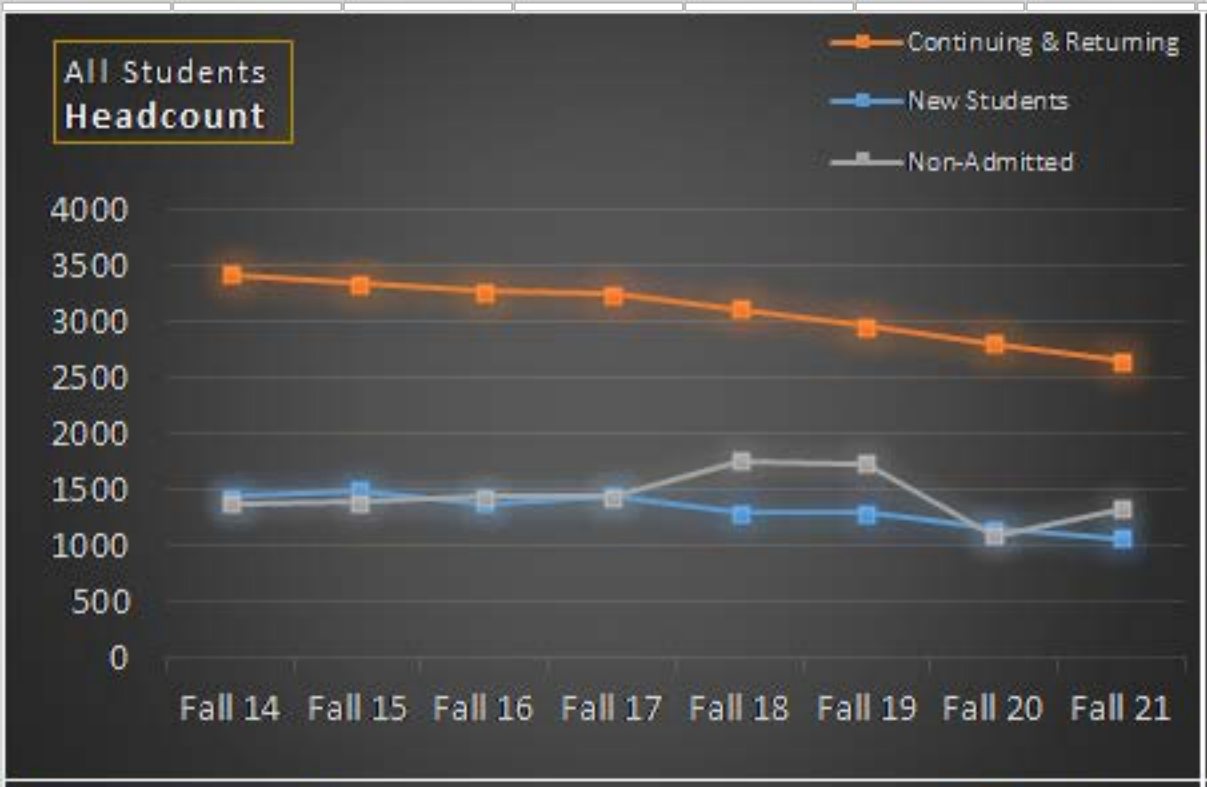


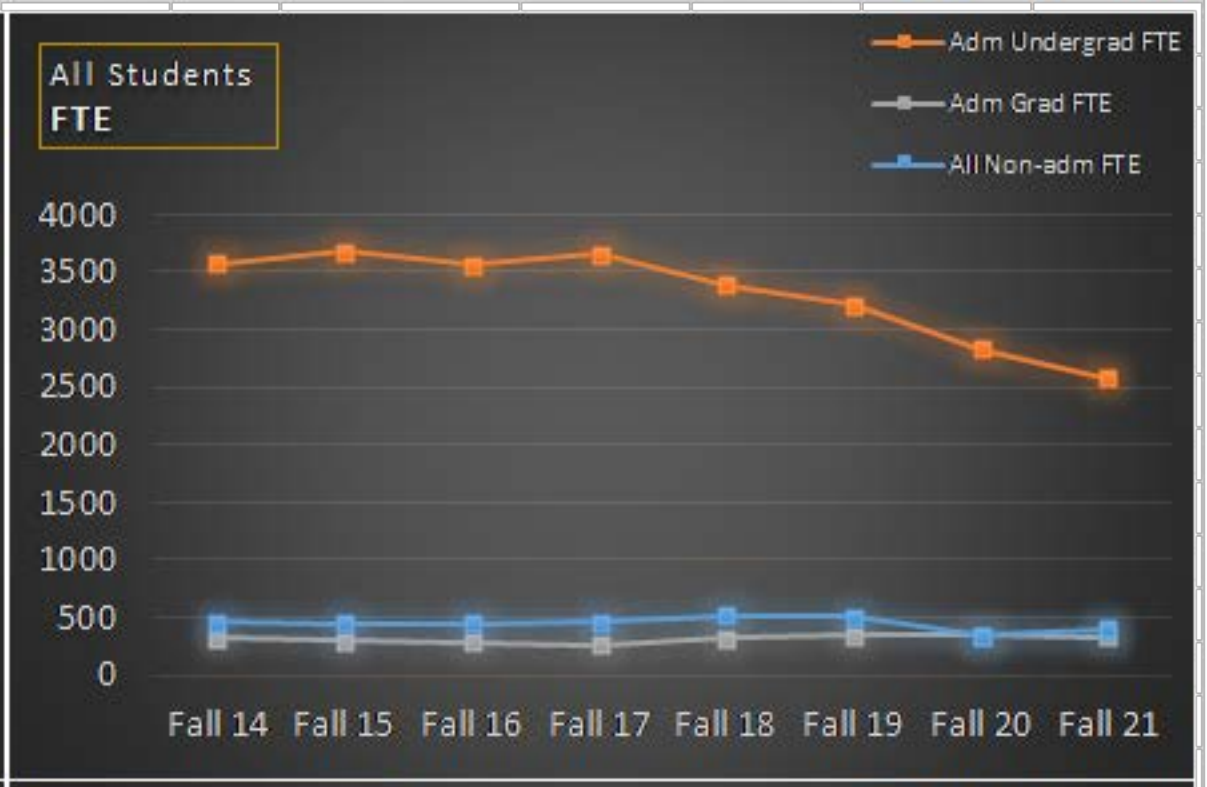
Freshman Cohort Grad Rate (6 yr)

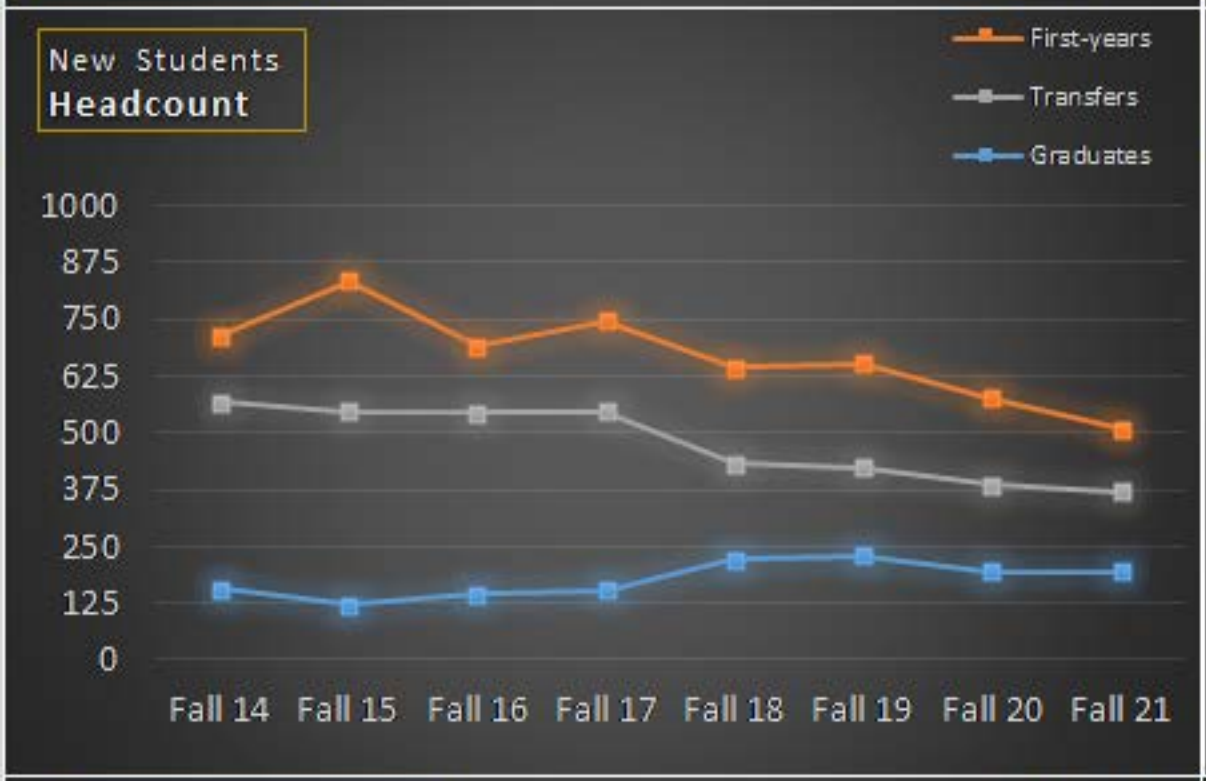


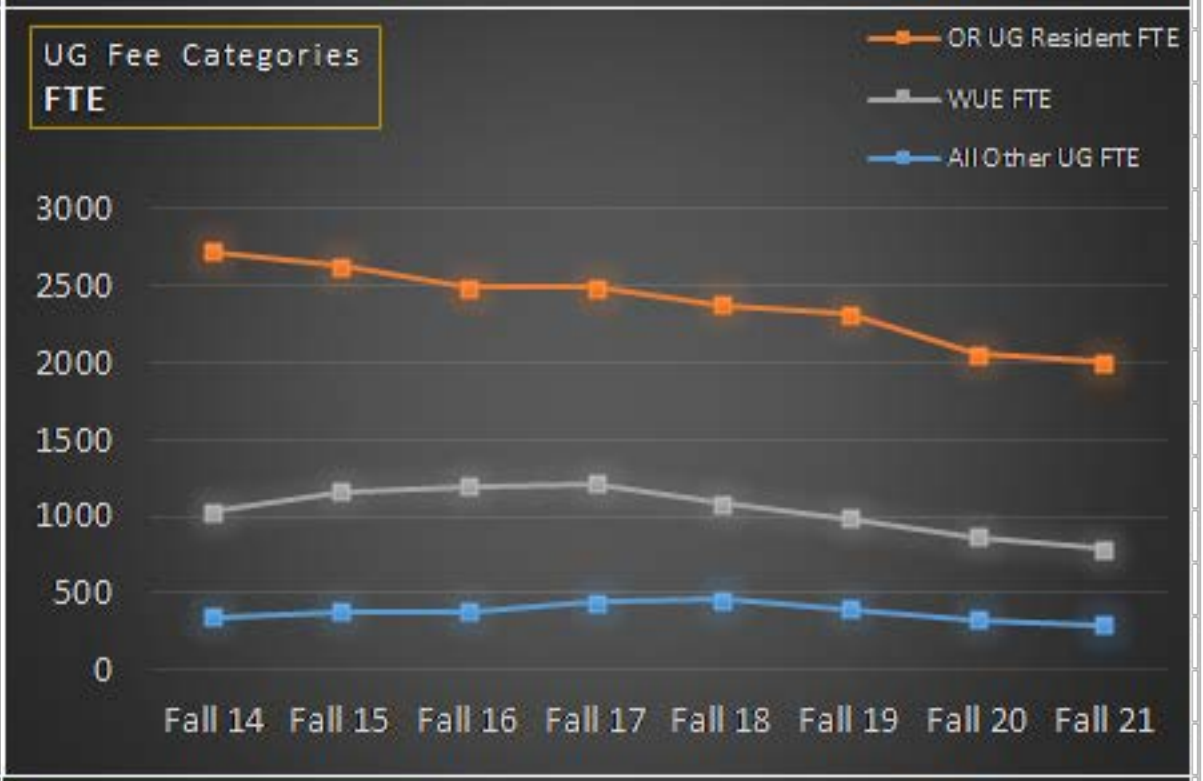
Transfer Cohort Grad Rate (6 yr)

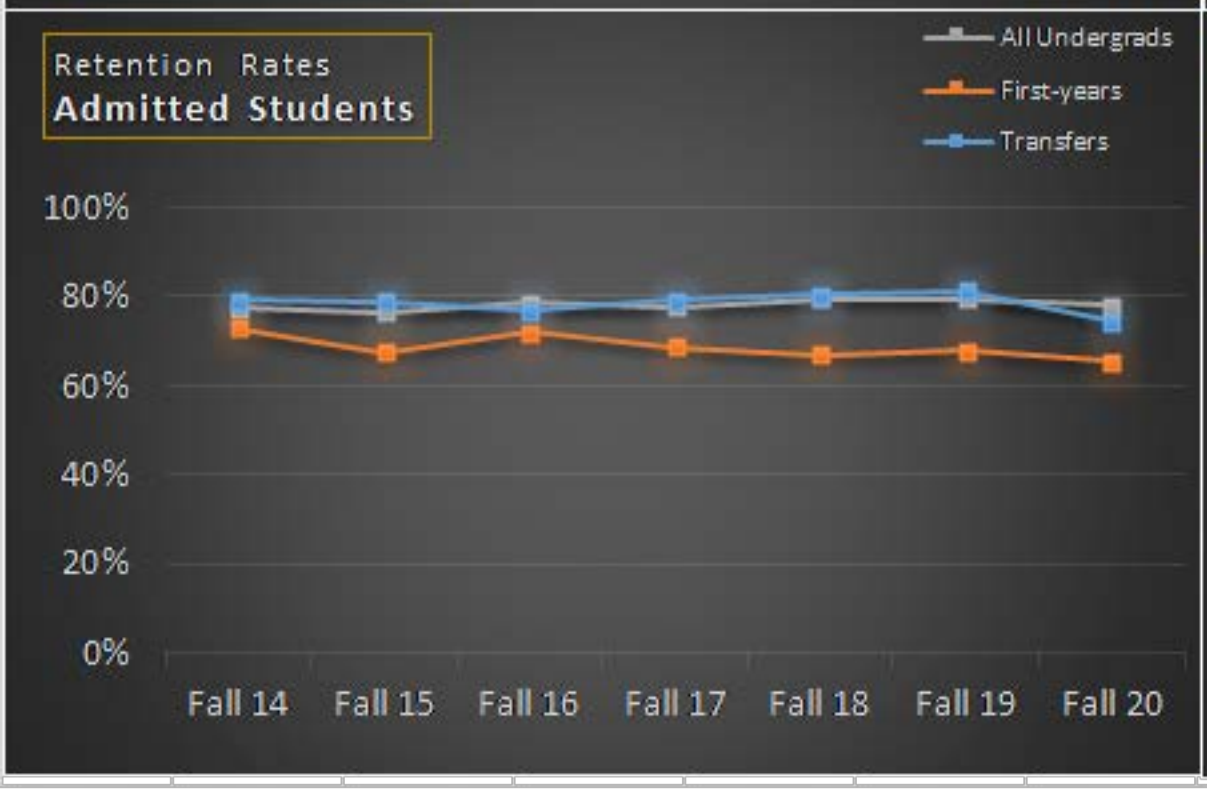
Yellow zones indicate prior year values.

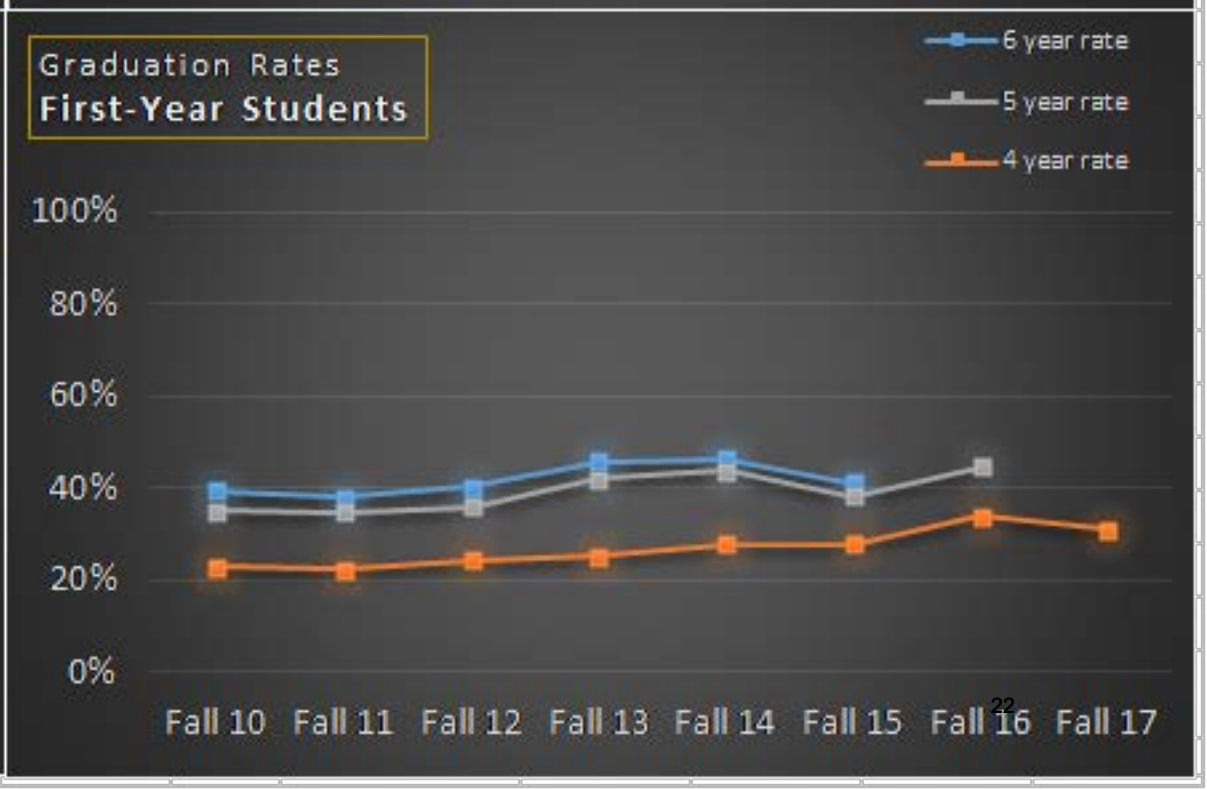

All Students
Headcount
Continuing & Returning
New Students
Non-Admitted
4000
3500
3000
2500
2000
1500
1000
500
0
Fall 14
Fall 15
Fall 16
Fall 17
Fall 18
Fall 19
Fall 20
Fall 21


All Students
FTE
Adm Undergrad FTE
Adm Grad FTE
All Non-adm FTE
4000
3500
3000
2500
2000
1500
1000
500
0
Fall 14
Fall 15
Fall 16
Fall 17
Fall 18
Fall 19
Fall 20
Fall 21


New Students
Headcount
First-years
Transfers
Graduates
1000
875
750
625
500
375
250
125
0
Fall 14
Fall 15
Fall 16
Fall 17
Fall 18
Fall 19
Fall 20
Fall 21


UG Fee Categories
FTE
OR UG Resident FTE
WUE FTE
All Other UG FTE
3000
2500
2000
1500
1000
500
0
Fall 14
Fall 15
Fall 16
Fall 17
Fall 18
Fall 19
Fall 20
Fall 21


Retention Rates
Admitted Students
All Undergrads
First-years
Transfers
100%
80%
60%
40%
20%
0%
Fall 14
Fall 15
Fall 16
Fall 17
Fall 18
Fall 19
Fall 20


Graduation Rates
First-Year Students
6 year rate
5 year rate
4 year rate
100%
80%
60%
40%
20%
0%
Fall 10
Fall 11
Fall 12
Fall 13
Fall 14
Fall 15
Fall 16
Fall 17

Curriculum Update

Enrollment Overview and Fall 2022 Update

Enrollment Update

October 20, 2022

Executive Dashboard and KPI’s

- Key Performance Indicators
  - Improvement in retention and graduation rates
  - What about those students not included in retention and graduation rate?”

Fall 2022 New Student Funnel, 4th Week

Funnel Report: New Applicant Headcount by Student Type
Fall 2021 Week Ending 10/17/21 vs. Fall 2022 Week Ending 10/16/22
4 Weeks After Start of Term

Applications

Student Type	Fall 2021	Fall 2022	Change	% Change
Freshmen - Resident	926	1,124	198	21.4%
Freshmen - Nonresident	945	975	30	3.2%
Transfer - Resident	353	286	-67	-19.0%
Transfer - Nonresident	275	217	-58	-21.1%
Postbacs/Grads	439	342	-97	-22.1%
Total Apps	**2,938**	**2,944**	**6**	**0.2%**

Admits

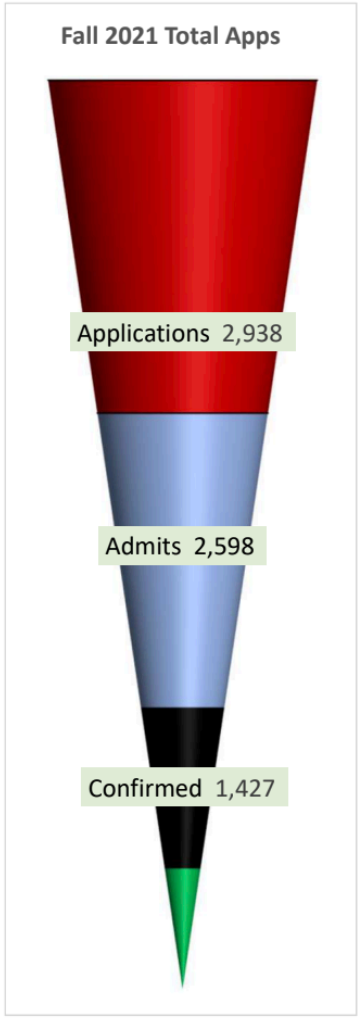
Student Type	Fall 2021	Fall 2022	Change	% Change
Freshmen - Resident	881	1,040	159	18.0%
Freshmen - Nonresident	866	889	23	2.7%
Transfer - Resident	325	268	-57	-17.5%
Transfer - Nonresident	249	179	-70	-28.1%
Postbacs/Grads	277	239	-38	-13.7%
Total	**2,598**	**2,615**	**17**	**0.7%**

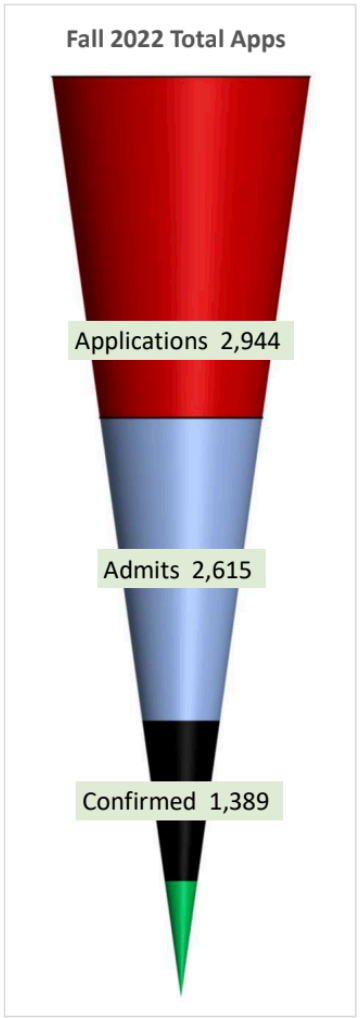
Confirmed

Student Type	Fall 2021	Fall 2022	Change	% Change
Freshmen - Resident	438	469	31	7.1%
Freshmen - Nonresident	259	316	57	22.0%
Transfer - Resident	269	234	-35	-13.0%
Transfer - Nonresident	184	131	-53	-28.8%
Postbacs/Grads	277	239	-38	-13.7%
Total	**1,427**	**1,389**	**-38**	**-2.7%**

Enrolled

Student Type	Fall 2021	Fall 2022	Change	% Change
Freshmen - Resident	321	348	27	8.4%
Freshmen - Nonresident	185	214	29	15.7%
Transfer - Resident	224	185	-39	-17.4%
Transfer - Nonresident	147	103	-44	-29.9%
Postbacs/Grads	192	159	-33	-17.2%
Total	**1,069**	**1,009**	**-60**	**-5.6%**



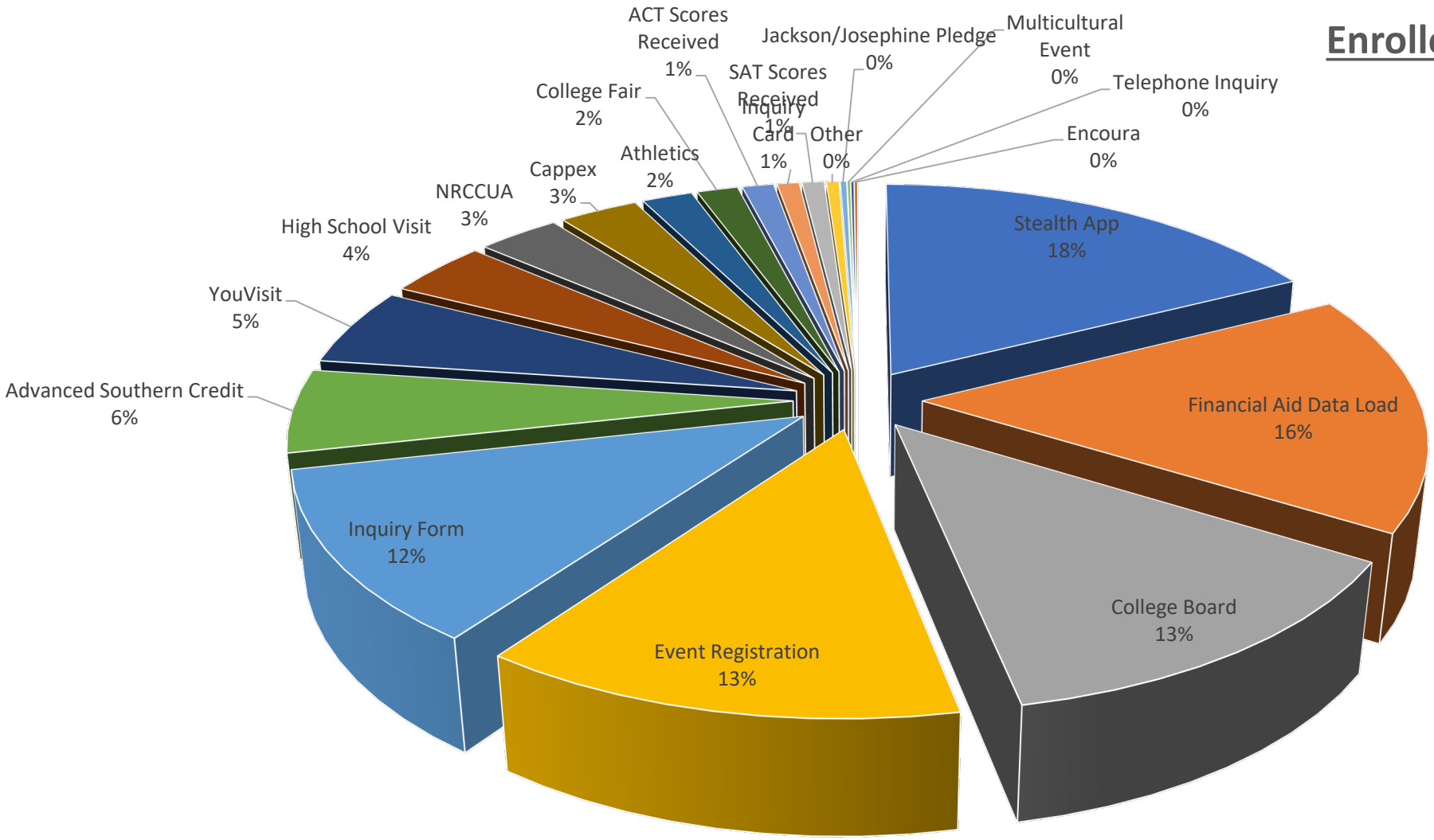


Office of Institutional Research Funnel Report Executive Summary Funnel - Fall 2022 Week -4.xlsx

Fall 2022 Enrollment 4th Week

	Fall 2021	Fall 2022	Change	% Change
New Freshmen	507	556	49	9.7%
New Transfers	365	281	-84	-23.0%
New PostBacs/Graduates	188	149	-39	-20.7%
Subtotal - New Students	**1,060**	**986**	**-74**	**-7.0%**
Continuing Students	2300	2105	-195	-8.5%
Returning Students	366	280	-86	-23.5%
Non-Admitted Students	1,213	1,335	122	10.1%
Grand Total - Headcount	**4,939**	**4,706**	**-233**	**-4.7%**
Grand Total - FTE	**3,269**	**3,106**	**-163**	**-5.0%**
Resident	3,517	3,395	-122	-3.5%
Non-resident	1,422	1,311	-111	-7.8%
International	64	62	-2	-3.1%
American Indian/Alaskan Native	66	55	-11	-16.7%
Asian	130	100	-30	-23.1%
Black/African American	88	88	-	0.0%
Hispanic/Latino	608	495	-113	-18.6%
Pacific Islander	43	37	-6	-14.0%
North African, Middle eastern, Other	28	36	8	28.6%
Two or More Races	421	323	-98	-23.3%
Subtotal - Students of Color	**1,384**	**1,134**	**-250**	**-18.1%**
White	2,827	2,218	-609	-21.5%
Unknown	664	1,292	628	94.6%
Alaska	38	37	-1	-2.6%
California	945	825	-120	-12.7%
Hawaii	49	38	-11	-22.4%
Idaho	36	35	-1	-2.8%
Washington	132	124	-8	-6.1%
All Other States	239	232	-7	-2.9%

Enrolled Source Codes



Enrollment Council Focus Areas

Recruitment and Marketing

- Demand Builder (add 100,000 names to prospective pool each year)
- K-12 Data Share and Admissions Pathway Guarantee Expansion
  - Signed Partners: Ashland; Central Point; Eagle Point; Medford; Grants Pass; Redmond Proficiency Academy; Phoenix-Talent
- Community College Partnership Agreements
- Adult learners and micro credentials
- Youth Programs Matriculation Rate Improvement
- Brand Identity
  - Update to style guide
  - Brand pillars and messaging
- EDI opportunities
- LAD Scholars

Enrollment Council Focus Areas

Financial Aid Leveraging (annual updates)

Diversity Scholarship improvements

Remissions policy

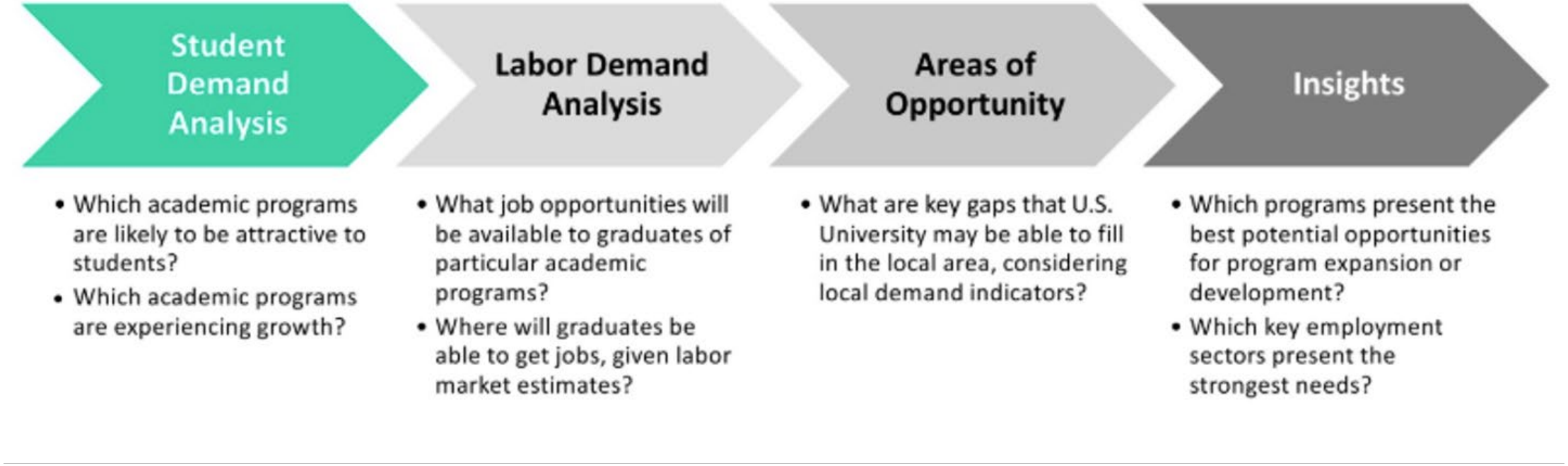
Enrollment Council Focus Areas

Student Success and Retention

- Closing the Equity Achievement Gaps
- Navigate Predictive Analytics
- Affinity Groups Year 2
- Student Withdrawal
- Connect Oregon
- Leadership Series
- LAD Scholars

Enrollment Council Focus Areas

- Academic Program Planning



Value of Higher Education and Student Mobility

VALUE OF HIGHER EDUCATION AND STUDENT MOBILITY

THE VALUE PROPOSITION

- Georgetown Study
  - 65% of jobs require a bachelor's degree
- National Center for Education Statistics, US Dept. of Education
  - *Report on the Condition of Education 2022*
    - Educational Paradox: educational attainment = higher earnings; postsecondary enrollment dropped by 9% since 2009 (5% from fall 2019 to fall 2020)
- NACUBO infographics
- New Indexes Developed
- New Outcomes Tool

NACUBO

A College Education Provides a Lifetime of Value

A COLLEGE EDUCATION SIGNIFICANTLY INCREASES LIFETIME PROSPERITY AND ECONOMIC SECURITY.

Lifetime Earnings

Source: Georgetown University Center on Education and the Workforce, "The College Payoff," 2011

Full-Time Median Earnings, 2015

Source: The College Board, "Education Pays 2016," 2016

Median Earnings per Week

Source: U.S. Bureau of Labor Statistics, "Current Population Survey," 2018

Full-Time Median Earnings for Millennials, 2012

(people ages 25 to 32)

Source: Pew Research Center, "The Rising Cost of Not Going to College," 2014

NACUBO

A College Education Provides a Lifetime of Value

COLLEGE-EDUCATED INDIVIDUALS ARE MUCH LESS LIKELY TO BE UNEMPLOYED.

Unemployment Rate, 2017

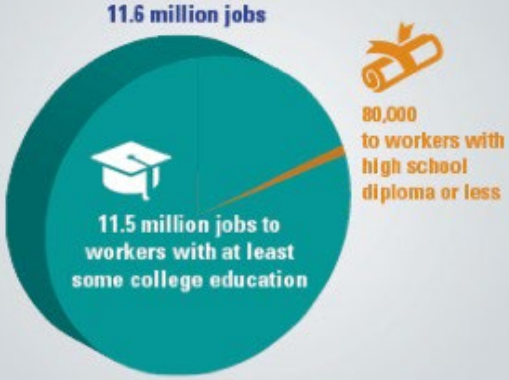
Source: U.S. Bureau of Labor Statistics, "Current Population Survey," 2018

Unemployment Rate Among Millennials, 2013

(people ages 25 to 32)

Source: Pew Research Center, "The Rising Cost of Not Going to College," 2014

Job Recovery After the Recent Recession

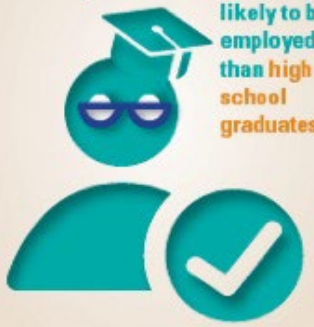


Source: Georgetown University Center on Education and the Workforce, "America's Divided Recovery," 2016

Employment Among Senior Citizens, 2010

(people age 65+)

College Graduates: 4.3% more likely to be employed than high school graduates

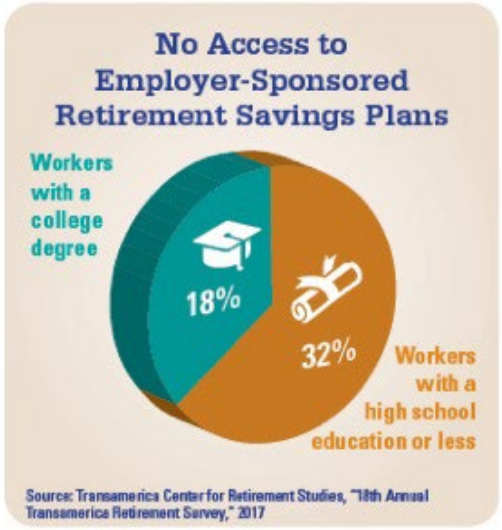


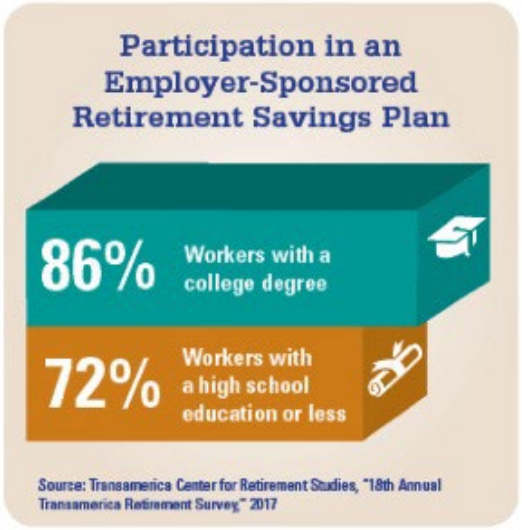
Source: National Center for Policy Analysis, "More Education, Better Retirement," 2013

NACUBO

A College Education Provides a Lifetime of Value

INDIVIDUALS WITH A COLLEGE EDUCATION ARE MORE LIKELY TO HAVE HIGHER LEVELS OF RETIREMENT SECURITY.





NACUBO

A College Education Provides a Lifetime of Value

JUST AS STUDENTS BENEFIT FROM A COLLEGE EDUCATION, SO DO OUR COMMUNITIES AND OUR SOCIETY.

People with a college education are significantly more likely to volunteer in their community and vote in elections.

Volunteerism

Source: U.S. Bureau of Labor Statistics, "Volunteering in the United States, 2015," 2016

Voting Participation, 2016

2016 Presidential Election Voters

Source: U.S. Census Bureau, "Voting and Registration in the Election of November 2016," 2017

Voting Participation, 2014

2014 Reported Voters

Source: U.S. Census Bureau, "Who Votes? Congressional Elections and the American Electorate: 1978–2014," 2015

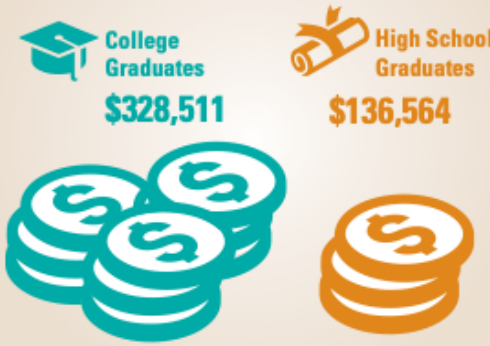
NACUBO

A College Education Provides a Lifetime of Value

JUST AS STUDENTS BENEFIT FROM A COLLEGE EDUCATION, SO DO OUR COMMUNITIES AND OUR SOCIETY.

College-educated individuals contribute increased tax revenues to support local, state, and federal governments.

Tax Contributions Over a Lifetime, on Average



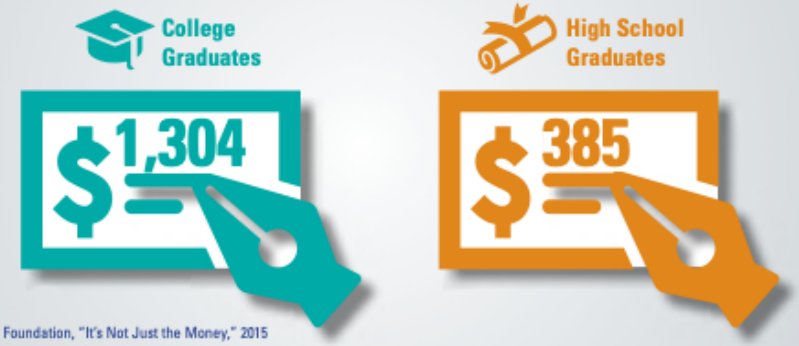
Lumina Foundation, "It's Not Just the Money," 2015

Tax Contributions Per Year, on Average

Source: The College Board, "Education Pays 2016," 2016

A college education leads to increased giving to charities.

Charitable Donations, on Average, 2012

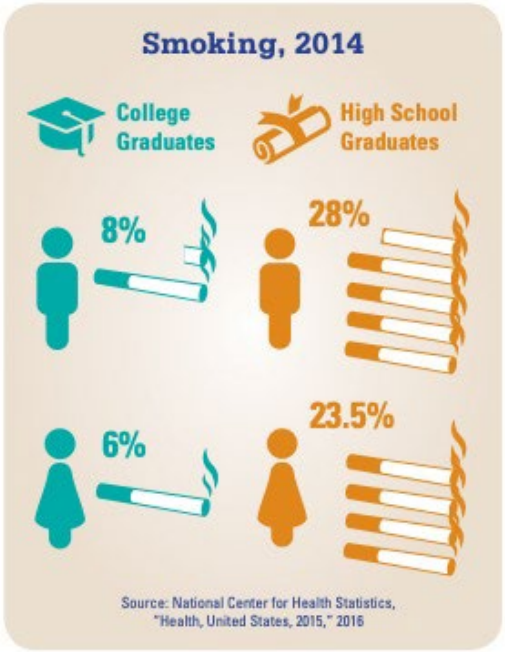


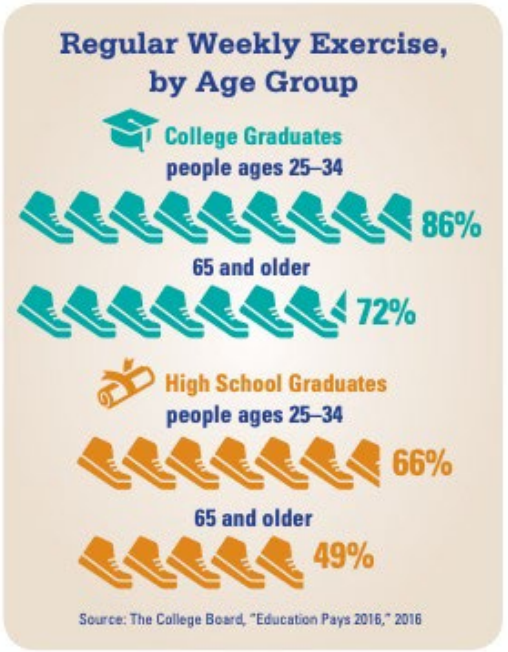
Source: Lumina Foundation, "It's Not Just the Money," 2015

NACUBO

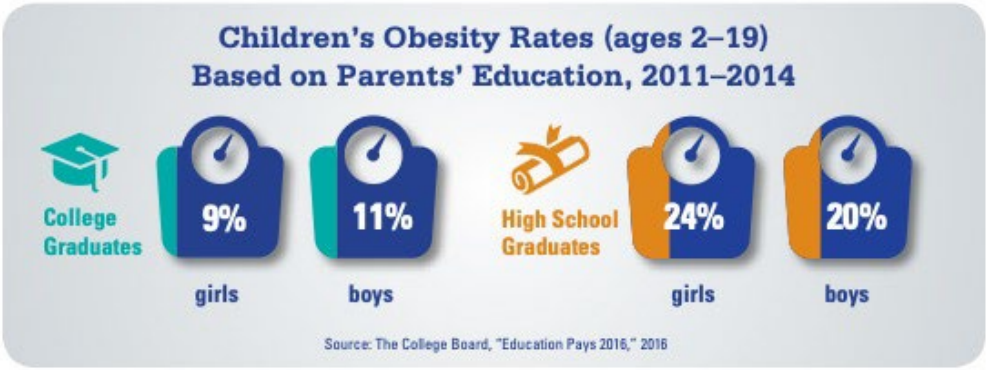
A College Education Provides a Lifetime of Value

A COLLEGE EDUCATION LEADS TO HEALTHIER LIFESTYLES.





A COLLEGE EDUCATION ALTERS FUTURE GENERATIONS.



STUDENT MOBILITY

- Higher education improves:
-
  - Social Mobility Index
    - The Social Mobility Index (SMI) measures the extent to which a college or university educates more economically disadvantaged students (with family incomes below the national median) at lower tuition and graduates them into good paying jobs
    - Oregon ranks 39th out of 50 for social mobility through higher education
    - SOU ranks 676 out of 1,550 institutions, ahead of notable institutions (UO-690; University of San Francisco-678; Stanford-1,177; Harvard-1,310; USC-1,106, etc...)
  - Economic Mobility Tool
    - Measures which schools enroll the highest proportion of students from low- and moderate-backgrounds AND provide them with a strong return on their educational investment.
    - SOU ranks 194 out of 1,350 institutions measured, this is in the top tier (Tier 1), top 20% of the institutions, 2nd highest ranking amongst Oregon institutions

SOU'S MEASURABLE OUTCOMES

- Career Services Redesign
  - Partnering with a consultant to conduct focus groups with key stakeholders, provide recommendations associated with best practices for liberal arts colleges organizational structure, SWOT analysis, and software.
- First Destinations Survey
- Post Secondary Employment Outcomes

SOU ACADEMIC PROGRAM EXAMPLE

DR. SHERRY ETTLICH

STEM DIVISION

SOUTHERN OREGON UNIVERSITY

PURSUE A STEM DEGREE AND MAKE A DIFFERENCE

BIOLOGY

- PARTNERSHIPS
  - Governmental Agencies, including U.S. Forest Service, National Parks Service, BLM, National Fish and Wildlife Forensics Lab
    - Amanda's Story
  - Medical Centers
  - And More
    - Ricky's Story

Amanda

Ricky

WHERE BIOLOGY GRADUATES GO

- GOVERNMENT SERVICE
- OUR SCHOOLS
- MEDICAL AND VETERINARY PROVIDERS
- AND MORE

John

Eugene

CHEMISTRY (BA/BS)

- PARTNERSHIPS
  - National Fish and Wildlife Forensics Laboratory
    - Megahn's Story
  - Assorted other partnerships with regional labs and businesses

WHERE CHEMISTRY GRADUATES GO

- GRADUATE PROGRAMS IN CHEMISTRY
  - Jack's story
- MEDICAL SCHOOLS
- AND MORE
  - Gwen's story

Jack

Gwen

COMPUTER SCIENCE (BS)

COMPUTER SCIENCE
SOUTHERN OREGON UNIVERSITY

WHERE CS STUDENT GO

Ashland School District
INSPIRING LEARNING FOR LIFE

Phoenix-Talent Schools
Excellence for Everyone

FIREBRAND RESILIENCY COLLECTIVE

shasta networks

ROGUE CREDIT UNION

Project A

Oregon Shakespeare Festival

JACKSON COUNTY oregon

LITHIA MOTORS, INC.

driveway

CITADEL DEFENSE

NG NORTHROP GRUMMAN

UMPQUA BANK

SOU Southern OREGON UNIVERSITY

BLUEHALO

mongoDB.

Google

amazon

docker

Adpearance

facebook

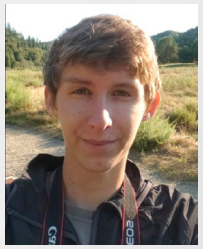
NETFLIX

AT&T

ORACLE

Alex

Isaac


Austin

Aldo

Rosie

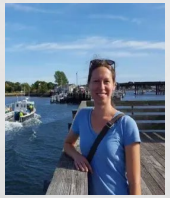
ENVIRONMENTAL EDUCATION (MS)

- SAMPLE PARTNERSHIPS
  - Large portion of BLM Educational Mission Component
  - SOU EE Kits Loan Program
  - Ruch Outdoor Community School
  - Crater Lake National Park Summer Professional Development Workshops for Teachers
- EE INTERNSHIPS
  - 60 hours of core curriculum place students in local organizations/agencies

WHERE EE GRADUATES GO

- SCHOOLS

- WILLIAM (2022)
  TEACHES 7/8TH GRADE
  ASHLAND MIDDLE SCHOOL



- JESSICA (2020)
  EDUCATIONAL ASST
  TRAILS OUTDOOR SCHOOL

- MICHAEL (2021)
  NORTH MEDFORD HIGH

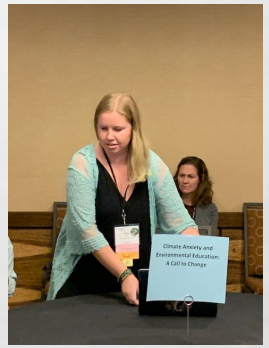
- NON PROFITS

- CRYSTAL (2019)
  COMMUNITY ENGAGEMENT MANAGER
  ROGUE RIVER WATERSHED COUNCIL

- NATALIE (FINISHING 2022)
  INCOMING EXECUTIVE DIRECTOR
  KLAMATH OUTDOOR SCHOOL

- ELVA (2019)
  SCIENCE COMMUNICATION, DEI AND OUTREACH COORDINATOR
  KLAMATH BIRD OBSERVATORY

- ONE MORE!



EMILY (2019)

PHD STUDENT

PENN STATE UNIV

MATHEMATICS

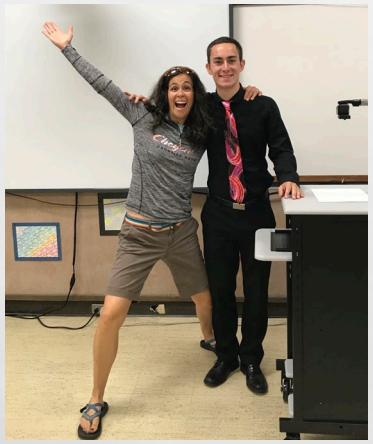
- PARTNERSHIPS
  - Public Schools
  - MaryAnn's Story

    Bickmore Actuarial

WHERE MATH GRADUATES GO

- SECONDARY EDUCATION
  - Melissa's story
  - Lisa and Brenton's story

Melissa


Lisa and Brenton

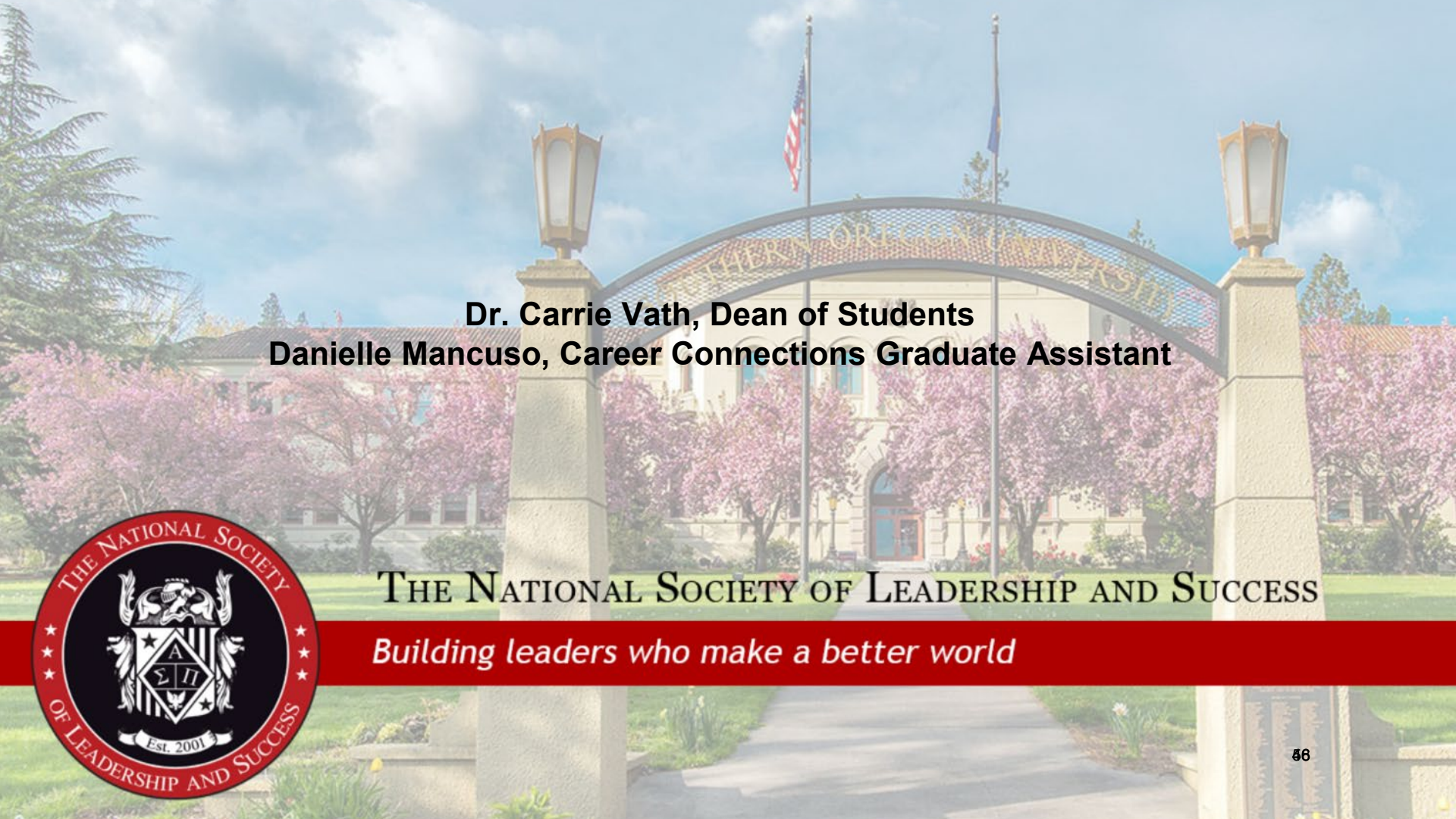
- GRADUATE STUDIES
  - Steven's story

Steven

- WORKPLACE
  - Kaitie's story

Kaitie

The National Society of Leadership and Success



Dr. Carrie Vath, Dean of Students
Danielle Mancuso, Career Connections Graduate Assistant

THE NATIONAL SOCIETY OF LEADERSHIP AND SUCCESS

Building leaders who make a better world

What is the National Society of Leadership and Success?

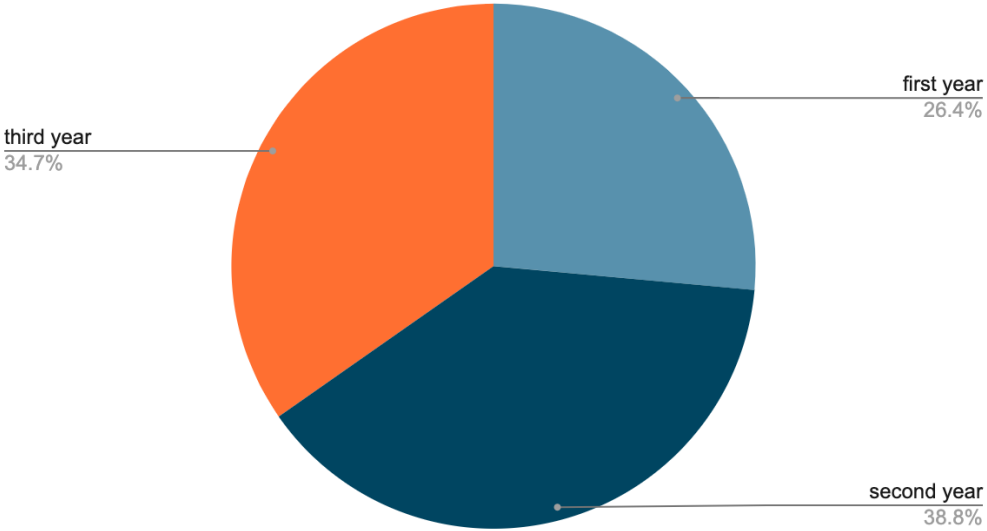
The NSLS is the largest and only accredited leadership honor society in the nation, with more than 700 chapters and over 1.5 million members. The NSLS mission is to build leaders who make a better world. NSLS encourages community action, volunteerism, personal growth, and strong leadership from its chapters and members.

Throughout the program, students hone valuable, in-demand skill sets that hiring managers specifically look for, including leadership, relationship-building, goal-setting, and effective communication.

Demographics

States: AL, AK, CA, CO, KS, NV, OR, UT, & WA
75% OR
15% CA

Class Standing



GPA: All members have a 3.0 or higher

Race/Ethnicity:	
Am. Indian/Alaskan Native	1%
Asian	1%
Black or African American	3%
Hispanic or Latinx	9%
Multiple	11%
White	66%
Unknown	9%

LEARNING OUTCOMES

In this program, members will:

- Own their core purpose and take the responsibility of their actions as they self-develop, and plan for their future. Along the way, they will explore and identify interests, passions, and potential.

- Be challenged to develop the courage to lead through the difficult challenges within leadership of self and others.

- Problem-solve through their leadership growth with a creative and collaborative spirit. They will look at the world with curiosity and find innovative, useful, and original solutions to all kinds of problems.

- Create positive change through life-changing and life-long learning experiences. They will learn how to use their passion, knowledge, and skills to create an impact for others and the world.

BENEFITS

SCHOLARSHIPS: More than $400,000 in financial aid for tuition books and so much more

JOB BOARD: Stand out to recruiters and employers on our exclusive job board

SPEAKER BROADCASTS: Attend live events hosted by industry leaders including former Presidents Barack Obama and George W. Bush, Dr. Bernice King, Mark Cuban, and many others.

SOCIAL EVENTS & NETWORKING: Join a community of student leaders on campus, online, and at 700+ chapters across the country

LEADERSHIP PROGRAM: Once students complete the program, they become inducted members and gain access to even more benefits, including personalized letters of recommendation, an exclusive NSLS job board, additional scholarships, and opportunities for advanced leadership education, allowing them to earn credits as they learn to lead.

Cost Management Updates

Academic Affairs

Criteria for determining cost reductions and opportunities for revenue generation in Academic Affairs

- **Academic Program Review** (see attached; 1/3 of all programs do this on a 3-year rotation schedule)
- Contribution to: Liberal Arts Foundation, Regional Responsiveness, Innovation and Creativity
- Student Credit Hours (SCH) by program over time
- Headcount (majors) by program over time
- Faculty FTE by program
- Degrees conferred (majors, minors, certificates) over time
- Retention (Fall-to-Fall by program) over time
- Course fill rate
- Average class size
- Revenue-to-Cost ratio over time
- Student-to-Faculty ratio over time
- Faculty type
    - tenured
    - probationary (non-tenured, 3-year extendable contract)
    - adjunct year long
    - adjunct term-by-term
- Faculty retirements (known)
- Faculty retirements and resignations (anticipated/likely)
- Open faculty and staff lines
- Staff and administrative positions

Strategies to further reduce costs; including but not limited to:

- Program reductions
- Non-renewal of adjunct year longs
- Reduction of adjunct term-by-terms
- Curricular adjustments/efficiencies
- Increase course fill rates
- Reduce administrative overhead
- HyFlex model of delivery

Strategies to increase revenue:

- Better marketing
- Convert minors to certificates to get revenue from SSCM (funding model)
- Create certificate for general education
- New and “emerging” programs using existing courses
- Fundraising to endow community supported faculty lines
- Leverage the Institute for Sustainability and Creativity Conference

ACADEMIC PROGRAM REVIEW,

Insert Name of Academic Program
Due to the Director of University Assessment by April 15, 2021

Purpose:

The purpose of the Academic Program Review (APR) is to provide a formal process and medium for program stakeholders to provide information about accomplishments, strengths, challenges, and to align academic programs with the goals as outlined in the SOU Strategic Plan. The APR can also help programs track the impact of changes to curriculum, program requirements, and faculty staffing over time. The APR can be used for both descriptive and evaluative purposes.

Audience:

The audience for the APR is your department, the administration, and the SOU board of trustees. The writing process and the APR document and data included in it are of critical importance for the programs and institution in their planning processes. The tone and voice of the APR need to be appropriate to these audiences and consistent throughout the entire report.

Executive Summary: (a page or less)

Mission and Vision Statements

A **mission statement** is a concise explanation of the program's reason for existence. It describes the program's purpose and its overall intention. The mission statement supports the vision and serves to communicate purpose and direction to clients, customers, vendors and other stakeholders.

Questions to consider when drafting mission statements could include:

- What is our program's purpose?
- Why does our program exist?

A **vision statement** looks forward and creates a mental image of the ideal state that the program wishes to achieve. It is inspirational and aspirational and should challenge employees. Questions to consider when drafting vision statements might include:

- What problem are we seeking to solve?
- Where are we headed?
- If we achieved all strategic goals, what would we look like 10 years from now?

Mission answers the question “Why do we exist?” Vision answers the question “What will the future look like as we fulfill our mission? What will be different?” While mission is about today, vision is about the future, what we will become.

A mission statement can and should be written in a short, concise form. It should pass the “T-shirt” test, meaning, it should be able to be printed on a t-shirt and still be readable. The vision needs to be more than a statement. It should be a description. This description may be a paragraph or a whole page. It should paint a picture of the future that will come to be as we carry out our mission

Some books and consultants encourage business and organizational leaders to write two statements, a mission statement and a vision statement. However, when organizations have two statements those statements begin to compete with each other and no one remembers either.

Write ONE statement, and make it the mission statement. Once you have clarity around your mission, then you are ready to dream about the future and how it will be different. That’s your vision!

I. PROGRAM DESCRIPTION/CONTEXT

A. What is the mission statement of the program?

B. What is the vision of the program?

C. Provide an overview of your program in 250 words or less.

II. THE STUDENT LEARNING EXPERIENCE

Strategic Direction 1: SOU will transform its pedagogy and curriculum (how and what it teaches) to enhance the success of its learners and graduates.
Goal 1: Develop curriculum and provide learning experiences that prepare all learners for life and work in an evolving future; connect directly with the challenges of our community, region, and world; and build self-confidence and the capacity to think critically, innovate boldly, and create lives of purpose.

*** This comment pertains to sections II, III, and IV. Your program needs to highlight some of the key data points included in the appendix in the narrative. You should summarize and distill the data down into a few sentences for each section. Use specific data and how you interpret the data in light of your program.

A. To the best of your ability, please describe the success of students within this program (e.g., admission to graduate programs, professional placement, etc.)?

- Key data point – Percentage of graduates within six months of graduating who are working or studying in their field.

B. Describe how students in this program participate in significant off-campus activities/programs (e.g., internships, civic engagement, experiential learning, service-learning projects, performances, exhibitions, etc.)?

- Key data point – Percent of students in program who are participating.

C. What are the scholarly and/or creative activities of the students in this program (e.g., capstones, professional presentations, publications, significant reports, creative endeavors, etc.)?

D. What are the program's assessment outcomes including both internal and external evaluations? How well do the majors achieve the program's student learning outcomes? (report provided by Kristin Nagy Catz)

- Potential Key data points:
    - reported scores on standardized national exams, VALUE institute
    - Assessment Committee Summary Data

E. Please address program success at SOU utilizing the data provided.

- Key Data points provided - Appendix A
    - Degrees Awarded by year - describe any anomalies or trends in the data over the last five years.
    - Major Counts
        - Undergraduates
        - Graduates
    - DWFI rates by class level, instructional method, strands if applicable, and a list of courses exceeding 20% DFWI.
    - Retention Analysis - Term to Term details

        - 3 Year - retention
        - 3 Year - Ethnicities selection/differential success rate
        - 2 Year - retention
        - 2 Year - Ethnicities selected/differential success rate
        - 1 Year - retention
    - Geographic Origin - most recent Fall term
        - Undergraduates
        - Graduates
    - Student Demographics - most recent Fall term
        - Undergraduates
        - Graduates
    - Minors by AY (first and second minors included)

F. Describe your program's efforts to redesign curriculum or courses to enhance student learning? Also, please provide any support that these efforts are effective. Have you noticed any student learning trends that have affected pedagogy and how have you addressed that?

III. PROGRAM APPRAISAL and INSTITUTIONAL SUPPORT

Strategic Direction II: SOU will become an employer of choice and provide excellent service to all of its constituents (e.g, learners, family, community)
Goal 1: SOU will develop effective orientation, training and professional development programs as well as a performance management process that rewards employees for continuous improvement.
Goal 2: SOU will improve its customer experience by streamlining business processes.
Goal 3: SOU will align its internal and external communications to foster greater collaboration and enhance its credibility.
Goal 4: SOU will design and implement a program that will develop a culture of service excellence in all employees

Strategic Direction V: SOU will maintain financial stability and invest for institutional vitality.
Goal 1: SOU will develop, implement and monitor a comprehensive strategic enrollment management plan.
Goal 2: SOU will develop key performance indicators to incentivize, monitor, and reward improvements innovations or efficiencies.

A. Have you made any changes to your program/processes to provide greater access to your program/classes, help your learners understand how to be successful in your program and/or connect them to career preparation. Are there opportunities for your program to better serve adult learners? Describe why or why not below.

B. **Service excellence: How do you serve students, the campus community, and external constituents and patrons? How does your program interface with the community?**

C. Institutional Support: Please comment on how well your program is served by administration, staff and institutional processes? Do the existing processes work well?

A series of data reports have been provided for review and reflection. How does this data inform program management and its efficiency?

Key Data points provided (Appendix B):

- SCH by year
  - Undergraduate SCH
  - Graduate SCH
  - Source of SCH by Primary Major (who is taking your classes - shows % of SCH serving majors)
  - SCH Distribution Across Programs (where are your students taking classes?)
- Program Retention - 5 year Student Return Rate
- SCH/ELU for last 3 years (full program, and by subject if more than one)
  - Includes SCH by Year, by Course Level
  - Includes Full program - over past 3 years
  - SCH/ELU major classes
- Course Fill rate = (filled seats/available seats in lecture sections)
- ELU breakdown by Faculty Type
- Distribution of classes by class size (lecture only)
- Avg/median class size-lecture/online/seminar/Telecourse (LUST)

IV. FACULTY

A. Describe the individual efforts of the program's faculty in maintaining a dynamic, innovative, and student-centered curriculum.

- Key Data from Activity Insight*
  - Curriculum Development Report

(this section will require faculty entry into Activity Insight, where there is capability to run on-demand reports that will provide faculty activities and accomplishments.)*

B. Summarize and describe the scholarly or creative output of this program over the past three years (based on most recent departmental expectations as presented in SOU bylaws). How do these activities enhance the program and community?

- Key Data from Activity Insight
    - Scholarship & Research Report
        - Average scholarly work per faculty member over the last three years
    - Service Report from Activity Insight (Professional, University, Community)
        - Leadership roles on campus per faculty member over the last three years

C. What are your hiring plans and how will they support the strategic directions of the university? (SD 4: Goal 1 and 2, Current Composition of Faculty, Diversity/Inclusion)

V. GOALS, ASPIRATIONS and 21st CENTURY TRANSFORMATIONS

Having reviewed the current state of your program, the purpose of this section is to look forward. In this section, we want you to consider the strategic plan and how your program is evolving.

A. Are there ways you can modify, augment, streamline or discontinue programming to add efficiencies or better meet the changing needs of students, industry and/or society?

B. What are the program goals for the next three years and how do they relate to the strategic directions?

C. What is your bold and audacious idea for your program? Frame your answer addressing how this idea supports SOU's mission and strategic directions. What would it take to accomplish your bold idea?

Division **Enrollment Management & Student Affairs**

Department _____

Employee completing form _____

Direction: Please work through the questions below and answer to the best of your ability – bullet points are perfect. Position/ function specific – not personnel management. The short-term purpose of this information is Cost Management. Your audience is Neil however Deborah will take highlights from this to populate a template that will be public.

1. What are the main objectives of your unit, and how do you measure success in achieving them?

2. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

3. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours. Indicate if functionality of the position is tied to federal, state, or institutional compliance.

4. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the university's mission?

5. How could the university help your unit do its job better?

6. In what ways does your unit relate to other units of the university, academic and non-academic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?

7. What skill sets and resources does you unit possess that can be shared with other units at slack times?

8. Which individuals in your unit are cross-trained and in what areas?

9. What resources do you need to improve your services to a superior level?

10. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?

11. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

12. How do you review and evaluate your department's yearly performance?

13. Explain how your unit could function with:

    a. A 10 percent reduction to staff
    b. A 20 percent reduction to staff
    c. A 30 percent reduction to staff
    d. A 10 percent reduction to non-personnel resources
    e. A 20 percent reduction to non-personnel resources
    f. A 30 percent reduction to non-personnel resource
    g. What would be the consequences or other effects on service delivery in each case?

14. What opportunities exist for greater collaboration and team approaches in the delivery of services?
15. How many “middle managers” do we have? Are there opportunities to reduce middle stata in the organization and expand the span of control?
16. What technological improvements could be made that would result in labor savings?
17. How can a service be more efficiently delivered?
18. What processes do we have that can be streamlined or eliminated to improve service delivery?
19. Restructuring: What efficiencies might be gained by consolidating similar entities?
20. Personnel: Have we worked around or structured around non-effective personnel and other personnel issues, and is this the time to stop indulging and start confronting the issue(s)?
21. Outsourcing: Are there other opportunities to outsource non-mission-critical services to private contractors who could do it better, faster, cheaper?
22. Customer focus: How might our services b structured or delivered to meet the needs of students, faculty, staff, donors, and others better?
23. Benchmarking: Compare your unit with similar units at other institutions or national norms.
24. What can we stop doing?

Athletics Department

Criteria for determining cost reductions and opportunities for revenue generation in Athletics.

- Number of student athletes per sport
- Cost of coaching and support staff
- Institutional program cost per student athlete
- ROI for existing and new programs
- Retention rates for student athletes in program
- Graduation rates per student athletes in program
- Program alignment with University DEI goals
- Alignment with related educational programs for cost efficiency and enrollment growth
- Alignment with other related non-academic programs for efficiency and enrollment growth
- Ties to philanthropic support
- Expectations of future facilities costs
- Amount of athletic remissions dollars per student athlete
- Amount of fundraised $ per program
- Amount of fundraised $ for scholarship and capital (i.e., naming rights for sand courts, etc.)
- Effect of sports lottery funding
- Compliance with Title IX requirements (maintaining opportunities for gender equity).
- Average SCH per student-athlete compared to university average

Strategies to further reduce costs:

- Incentives to staff who are close to retirement
- Program (S&S) reductions

Strategies to increase revenue:

- Fund raising to endow coaching positions
- Enrollment quotas for programs

Update on Revenue Enhancement Work in Academic and Student Affairs

Revenue Enhancement Projects: Summary & Implications

October 20, 2022
Academic & Student Affairs Committee
SOU Board of Trustees

Dr. Matt Stillman
University Registrar
Assistant Vice President for Enrollment Management

Josh Lovern
Director of Budget and Planning

Introduction:

We've been working diligently for the past year to:

- Enhance understanding of the intricacies of SSCM
- Ensure we're capitalizing on the system and are already getting "credit" for what we do
- Identify and make immediate progress on enhancements to our funding

Focal points thus far:

- State-level SSCM Technical Review Group
- Senior and staff audits
- CIP codes
- Bilingual Education

State-Level SSCM Technical Review Group:

- Josh and Matt serving on group
- Careful examination of the model
- Concerns with calculations, rule interpretation, and transparency being addressed
- End sum, increase our understanding of the processes, improve the accuracy of the model, and enhance the transparency and accountability of HECC
- Many calculations are in flux, hence why we're not giving dollar figures today – True-up hopefully will fix!

Senior & Staff Audits:

- Discovered that audit activity is fundable in SSCM
- Started converting OLLI work to 1-credit modules Fall 22
  - Approx. 1065 SCH so far (modeling shows roughly 3000 sch per year)
  - Example: UGS 198 See Like a Geologist: Iceland (75 SCH)
- Future:
  - Continue to expand senior audits
  - Working towards converting staff training/development to audit activity over next year

Classification of Instructional Programs (CIP Codes):

- CIP codes are used to classify courses and degrees
- “Value” of courses/degrees vary in SSCM, and STEM bonus
- None of this mattered when they were created, so we’re going back and changing MANY to maximize funding (still within the rules), especially with an eye to STEM bonus
- Example: moved all MS coursework to a slightly different “Military Applied Sciences” CIP code that’s STEM-eligible
  - Roughly 200 SCH a term there alone.
- Future: continue to refine course CIPs, more work soon with degree classifications

Bilingual Education:

- Supposed to get extra points for BLE (Bonus additive), but have not been receiving
- Working through reporting mechanism & should increase our funding moving forward
- SOU is in prime position to capitalize on this given our curriculum & growth in this segment
- Work with Faculty to ensure all BLE is being counted

Summary:

- Increased accuracy/understanding of the model
- Enhanced funding through SSCM
- Leverage funding for activities we're doing regardless
- Effectively use our internal expertise to SOU's advantage
- Additional curricular developments forthcoming

Questions/Discussion

Proposed Committee Meeting Schedule (Action)

SOU Board of Trustees 2023-2024 Board and Committee Meeting Schedule				
MEETING	**Academic and Student Affairs**	**Finance and Administration**	**Executive, Audit and Governance**	**Board of Trustees**
DAY	Third Thursdays	Third Thursdays	Third Fridays	Third Fridays
FREQUENCY	Four Times Per Year (and as needed for curriculum approvals)	Six Times Per Year	Five Times Per Year	Five Times Per Year
TIME	12:00-3:30 p.m.	4:00-6:00 p.m.	9:30-11:30 a.m.	12:00-5:00 p.m.
	January 19, 2023	January 19, 2023	January 20, 2023	January 20, 2023
	~~March 16, 2023~~	March 16, 2023	~~March 17, 2023~~	March 17, 2023
	April 20, 2023	April 20, 2023	April 21, 2023	April 21, 2023
	June 15, 2023*	June 15, 2023*	June 16, 2023*	June 16, 2023*
				Retreat September 13, 2023** September 14, 2023** All Day, Time TBD
	October 19, 2023	October 19, 2023	October 20, 2023	October 20, 2023
	January 18, 2024	January 18, 2024	January 19, 2024	January 19, 2024
		March 21, 2024 (Budget focus)		
	April 18, 2024	April 18, 2024	April 19, 2024	April 19, 2024
		May 16, 2024 (Budget focus)		
	June 20, 2024***	June 20, 2024***	June 21, 2024***	June 21, 2024***
				Retreat September 19, 2024 September 20, 2024 All Day, Time TBD
	October 17, 2024	October 17, 2024	October 18, 2024	October 18, 2024

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Future Meetings

Adjournment