



OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

March 10, 2023

TO: Southern Oregon University Board of Trustees
FROM: Sabrina Prud'homme, University Board Secretary
RE: Notice of Special Meeting of the Board of Trustees

The Board of Trustees of Southern Oregon University will hold a special meeting on the date and at the location set forth below.

Agenda topics for the meeting include the board's review of SOU Forward: University Realignment Plan, and a discussion of the realignment plan with the university's administration. No action will be taken on the proposed plan at this meeting.

The board also will hold an extended public comment period up to 90 minutes during this special meeting.

The meeting will occur as follows:

Friday, March 17, 2023

11:30 a.m. to 5:00 p.m. (or until business concludes)

Meese Room, 3rd Floor, Hannon Library (overflow viewing in room 352)

Members of the public may view the proceedings at <https://sou.zoom.us/j/82559757664> 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 Special Meeting
March 17, 2023



Call to Order / Roll / Declaration of a Quorum



Board of Trustees Special Meeting

Friday, March 17, 2023

11:30 – 5:00 p.m. (or until business concludes)

Meese Room, Hannon Library, SOU Campus

Zoom: <https://sou.zoom.us/j/82559757664>

AGENDA

Persons wishing to provide public comment shall sign up in advance or do so in writing via trustees@sou.edu.

Please note: timings are approximate and items may be taken out of order

- | | | | |
|----------|----------|---|---|
| 10 min. | 1 | Call to Order/Roll/Declaration of a Quorum | |
| | 1.1 | Welcome and Opening Remarks | Chair Daniel Santos |
| | 1.2 | SOU Land Acknowledgment | Liz Shelby |
| | 1.3 | Roll and Declaration of a Quorum | Sabrina Prud'homme,
SOU, Board Secretary |
| | 1.4 | Agenda Review | Chair Santos |
| 5 min. | 2 | Consent Agenda | Chair Santos |
| | 2.1 | September 16-17, 2022, Minutes | |
| | 2.2 | January 19, 2023, Minutes | |
| | 3 | Information and Discussion Items | |
| 45 min. | 3.1 | SOU Forward Realignment Plan
<i>(No action will be taken on this item)</i> | President Rick Bailey |
| 90 min. | 3.2 | Public Comment | |
| BREAK | | | |
| 115 min. | 3.3 | SOU Board of Trustees and Administration
Realignment Plan Discussion | Chair Santos; President
Bailey |
| 5 min. | 3.4 | Future Meetings | |
| | 5 | Adjournment | Chair Santos |

Consent Agenda

**Board of Trustees of Southern Oregon University
Board of Trustees Retreat
September 16-17, 2022**

Minutes*

Call to Order/Roll/Declaration of a Quorum

Chair Daniel Santos called the meeting to order at 1:15 p.m. He welcomed trustees to the annual retreat and welcomed new trustees to the board. He also acknowledged the incredible generosity of Lithia Motors' \$12M gift to SOU. Vice Chair Sheila Clough read the SOU Land Acknowledgement.

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

Daniel Santos	Present	Shaun Franks	Present
Rick Bailey	Present	Andrew Gay	Present
Brent Barry	Present	Christina Medina	Present
Jon Bullock	Present	Mimi Pieper	Present
Katherine Cable	Present	Barry Thalden	Present
Sheila Clough	Present	Bill Thorndike	Present
Debra Lee	Present		

Guests in attendance included Sabrina Prud'homme, Vice President Greg Perkinson, Josh Lovern, Liz Shelby, and Iris Maria Chavez.

Public Comment

No comments were offered from the public.

Information and Discussion Items

Budget Orientation for New Trustees and Review for Continuing Trustees

Vice President Greg Perkinson and Director of Budget and Planning, Josh Lovern, presented an overview of the budget to help trustees understand the budget and how SOU is funded. As presented in the meeting materials, Vice President Perkinson reviewed sources of revenue including specifics on state funding and enrollment as key drivers. He then discussed cost drivers for expenses such as compensation, health and retirement benefits, other personnel expenses, and supplies and services.

Director Lovern provided an in-depth review of the financial pro forma, including each of the line items in the budget. He discussed the Education and General fund noting that 2/3 of that budget comes from tuition and fees derived from enrollment and 1/3 comes from state funding; Mr. Perkinson explained the process for securing state funding. They discussed the importance of maintaining the board's fund balance as a key performance indicator, the board's spending authorization, as well as limitations in the approved budget. Mr. Perkinson provided a "deep dive" on the function of transfers in and out of fund types for budgetary purposes, reviewed miscellaneous revenues such

as growth in fees, and the land lease offset by bad debt allowance.

During the presentation, trustees asked clarifying questions, and commented on the opportunities that abound with the fiscal pressures facing SOU as well as others in the region. The point was made that \$3.81M must be cut in expenditures by FY 2023-24 to ensure payroll can be met. Trustee Thalden reiterated that SOU cannot survive in an environment of increasing costs and decreasing revenues. He said this is an exciting opportunity to change. There was much discussion on the need to make changes and that these challenges are not unique to Southern Oregon University. More conversation ensued about the need to make structural changes rather than one-time savings such as vacant positions or federal COVID funding.

Fiscal Sustainability and Embracing Entrepreneurship: Changing the Fiscal Model

President Rick Bailey introduced the topic noting that SOU is at a [financial] inflection point: he underscored the importance of SOU's future and making decisions about what SOU can stop doing, what it should continue doing, and where it will invest its precious resources. In a few days following the retreat, the university president will hold an "all call" meeting where he will have a sobering opportunity to express these same ideas to university attendees. He said that SOU has four options: 1) a massive tuition increase, which he is wholly opposed to; 2) an across-the-board salary cut, which is unlikely to happen; 3) SOU can do a "more of same" salami slicer approach of cuts to everyone; or 4) the university can operate differently.

Trustee Gay questioned what SOU can stop doing or do differently. He expressed that, although academic programs are revenue producing, they may not cover support services that are not revenue generating. He shared his concern that it's not necessarily that the academic program is producing but he believed more could be done in marketing to bring more students to the programs. President Bailey believed that assumption ignores the fixed costs of running the institution but acknowledged that students are at SOU for specific programs and if those are not offered, the students will go elsewhere. Hence, making cuts to academic or athletics is an impossible but necessary task. To address Trustee Gay's point regarding marketing, President Bailey reiterated Vice Chair Clough's and Chair Santo's points about what the university can invest in. Trustee Pieper agreed with the points made about marketing, encouraging marketing internally to existing students as well.

Trustees engaged in a lengthy discussion about the identity of SOU, how to better make it known what SOU does, and the importance of internal and external marketing. SOU is a regionally responsive, liberal arts and sciences university with a focus on creativity and innovation. Trustees agreed that the university needs to address "who we are at SOU."

President Bailey reviewed the pro forma, noting that if nothing changed, SOU would be seeing a \$13M to \$14M structural deficit in 2026. He talked about the increasing costs, declining revenue, and the goal to make revenue greater than or equal to costs. When discussing the vision and changing the model, President Bailey described strategies of

cost management, highlighting projects like Computer Information System Replacement, and energizing the campus with solar, which, together were estimated to save SOU annually \$700K and over \$1M, respectively. He also discussed major revenue-generating ideas of grants, philanthropy, and revenue diversification in general. There was much discussion about the idea of a senior living facility.

Trustee Bullock, a big fan of the vision, cautioned that school reforms often fail for three reasons: “bad ideas,” reforms outpace clientele and are too far in front of where people want to go; and causing people to work differently. He posited that the campus might ask, “If SOU will make all this additional money from new revenue streams, why are cuts being made?” He further emphasized that a plan might change to better deliver what students want; explain change to faculty and staff; and be marketed so that SOU does not outpace the clientele. There was much discussion of projects that need to be reimaged to remain relevant and how to communicate this new vision to get buy-in from students, faculty, and staff, which will not be easy and will have a residual impact on other strategies. President Bailey explained his approach and asked for feedback.

There was much discussion regarding the timing and issues surrounding cost management. The objective is to complete the plan soon so people do not feel like they are “on the edge.” June of 2024 is the target date for implementation of the realignment/cost management plan and the earliest the university will see any new revenues would be summer of 2025.

To conclude the day’s discussion, the president gave an overview of what he’d like to discuss the following day. He planned to share the guiding principles that will be used during the realignment process and how he’s going to achieve them. He wanted to talk about the stakeholders and the university-wide conversation to ensure everyone has a voice. Lastly, plans to discuss the role of the board.

Temporary Adjournment

Chair Santos thanked everyone for the day’s discussion and their remarks. He adjourned the meeting at 4:03 p.m.

September 17, 2023

Chair Santos reconvened the meeting at 9:02 a.m. on Saturday, September 17, 2022. He thanked everyone who was able to join dinner the previous night.

Review of Day 1

President Bailey outlined that day’s goals were to review thoughts from the previous day; discuss guiding principles; discuss communication—making sure it is universal and all voices are heard throughout the process; and a discuss the board’s role.

President Bailey explained that the forthcoming endeavor will not be the same as previous cuts or retrenchments. Trustees discussed the notion of running SOU like a business, the challenge of doing so, and how to translate this during the realignment.

Much discussion took place and advice was given on how to frame the conversation. Trustee Pieper emphasized that it's not just faculty and staff but students are concerned about what is happening and they don't know where to go to get information about what is happening. Students want to be updated and hear the explanations.

Trustees shared their opinions on how to lessen the negative impact for people. Trustees Gay and Barry suggested a pledge to not raise tuition for the next five years or another major commitment to students to inspire people and demonstrate it is really going to help students. Discussion ensued about the suggestion and it was determined that it would be a very difficult to implement and manage.

Communication Planning

President Bailey shared his plans for communications including town halls as well as meetings with individuals, shared governance groups, unions, and the desire to give everyone a voice. There was further discussion on "who are we" and how that affects everyone, including those impacted in layoffs. There was a common sentiment that everyone is at SOU for the students and to change lives. Trustees referred to the guiding principles and provided specific examples on how to utilize and maintain these strategies. The importance of athletics being at the table was emphasized. Trustee Barry warned of potential fears that SOU will not recover from major cut; he suggested reframing that into hope but advised not to sugar-coat reality.

In response to ideas around presenting qualitative and quantitative data, trustees agreed that the best route is to keep it simple, clear, and concise during the all-campus breakfast and provide more information later. The impossible task is to try and create some kind of common denominator for the academic programs, academics, student services and other departments, which differ. There was further discussion on retrenchment and exigency, and President Bailey made it clear that was not the plan; both unions will be a part of the dialogue and get buy in.

A strategy of message saturation was encouraged. Trustees commended the vice presidents and suggested utilizing their assistance with this saturation. President Bailey said he was reticent to put the vice presidents in the line of fire and that he planned to take responsibility for the plan and ensuing cuts.

Trustee Thalden talked about increasing revenue to cover the increasing costs. President Bailey recognized the timing of such activities and said there is a structural deficit to address right now.

Vision for SOU and Guiding Principles for Decision-Making

President Bailey shared his vision on what 2026 will look like. He asked the board to imagine that the financial problems have been resolved; that SOU is on the other side of the realignment with energy costs eliminated by solar; that Workday is completely implemented and staff have ten hours back in the week for self-care; and SOU has reimaged grants and millions of dollars coming in to encourage creativity among staff and faculty; and more.

The board discussed the president's strategy to present this to the campus community during the upcoming all-campus breakfast. President Bailey appreciated trustees' advice and guidance on use of language, leveraging regional partnerships, refining the vision, meeting in an interest-based process, and more. Vice Chair Clough applauded the incredible vision and the emphasized the need to communicate it with hope and to inspire collaboration. Trustees agreed that the message should be inspirational but should also include specific language of the challenges, including loss of jobs. SOU's recent increase in financial gifts and the impact on financial sustainability of SOU should also be stressed.

Regarding the guiding principles that will be necessary on the journey toward fiscal sustainability, President Bailey reviewed eight guiding principles: integrity; maintaining a focus on students; transparency; compassion, long-term vision; justice, equity, diversity, and inclusion; universality; and humility. These principles were not listed in any particular order, as each of them is important and must be upheld. Trustees agreed with the principles.

General Timing of Activities

Timing of the upcoming all-campus presentation, timeline for creating a plan during the current academic year, a goal of realizing reductions in the 2024 fiscal year, and other timing considerations were discussed throughout the retreat.

The Role of the Board

Chair Santos introduced this brief item, reminding trustees that board asked President Bailey to "make it so" and stressed that the board needs to support him in this process; trustees agreed. President Bailey said his instinct is to take responsibility for the recommendations and decisions but noted that the board will be in public eye and wanted trustees to be prepared for this.

Chair Santos thanked everyone for the time and input. President Bailey thanked everyone for their candor and comments.

The meeting was adjourned at 2:45 p.m.

* Due to the nonlinear discussion of the retreat format, the discussion above is captured topically rather than in the order in which the discussion took place.

Board of Trustees of Southern Oregon University
Board of Trustees Listening Session
Thursday, January 19, 2023

MINUTES

Call to Order/Roll/Declaration of a Quorum

Chair Santos called the listening session to order at 3:46 p.m. He thanked all the trustees for attending the special listening session. He explained the board's interest in hearing from university constituents and explained the format of the extended public comment session.

The secretary called the roll and a quorum was verified.

Daniel Santos	Present	Shaun Franks	Present
Rick Bailey	Present	Andrew Gay	Present
Brent Barry	Present	Christina Medina	Absent
Jon Bullock	Present	Mimi Pieper	Present
Katherine Cable	Present	Liz Shelby	Present
Iris Maria Chavez	Present	Barry Thalden	Present
Sheila Clough	Present	Bill Thorndike	Present
Debra Lee	Present		

Public Comment

Sara Adams, President of Associated Professors of SOU (APSOU), senior instructor of accounting, and SOU alum, said that as a CPA she understands financial issues. This is her tenth academic year and President Bailey is the fourth president she has worked under. She questioned the process of the realignment plan and faculty involvement. She asked how this realignment is different from past restructuring. Ms. Adams pressed for detailed accounting of cost savings. She implored the trustees to explore the consequences of the proposed cuts and diminished programs.

Brian Fedorek, Faculty Senate Chair, recalled President Bailey's welcome back breakfast where the President referred to the five major groups on campus being APSOU, Faculty Senate, SEIU, ASSOU, and Staff Assembly. These groups got together last week. He summarized that there was a feeling of lack of transparency. Although he acknowledged the information had been posted on the website, lack of involvement with leaders of these groups left them feeling that the process lacked transparency. They thought the process was very "top down." He urged the board to encourage the administration to invite the groups to the table to hear from them. Mr. Fedorek acknowledged the Academic Affairs "data dump" at the end of fall term and encouraged the other groups to do the same. He said he'd like to see more discussion and debate regarding the plan.

Chandler Campbell, a second-generation SOU student, talked about the state of the University's internet infrastructure. He stated that SOU students and faculty get a quarter of what people at OSU received five years ago in regards to internet services.

He said that not having fast internet is like not having running water and that SOU's wireless and guest networks are not secure. Mr. Campbell shared his concern about [internet] privacy at SOU and compared it to not having a fence with a hole, but rather, never having built the fence. He stated that this is important because technology is important and when substandard services are provided, it sends a message that SOU accepts substandard results here. He does not think anyone wants that.

Jesse Longhurst, Associate Professor of Education, new chair of Graduate Education Programs, SOU Alum, and former high school teacher, talked about the absolute vital role SOU plays in growing and advancing the education workforce in the region and state. SOU started as a normal school when teachers were scarce in Southern Oregon and that the need remains, as there is a national and worldwide teacher shortage. The number of applicants in the education department is down which is in-line with trends. Her silver-lining is that 100 percent of graduates from SOU's licensure programs are employed. This year 80 percent of students are employed on temporary licenses before leaving the program. Local districts need SOU to send them classroom teachers, autism specialists, counselors, principals, and superintendents. Changes are being made to make education programs more accessible. This fall, the Master of Arts in Teaching program will be available in a hybrid format allowing anyone, anywhere in the state, to attend SOU. The program is working not only to be the only teacher preparation program within 200 miles and the only program in the state for which distance becomes irrelevant. She stated that the education department relies on its colleagues in general education, math, English, and physical education for subject-area specialists. She cautioned that hollowing out programs affects everyone. Ms. Longhurst concluded that the community has relied on SOU for well over a hundred years and that she thinks they need to be able to do so for the next hundred.

Victor Chang, Assistant Professor in Clinical Mental Health Counseling and long-time resident and parent, agreed with comments made by his colleagues and echoed that education plays a vital role in the region, statewide, and across the country. He addressed President Bailey directly with appreciation for Dr. Bailey's authenticity, integrity, and truthfulness but also expressed his disappointment in the content of the messaging so far. He stated that he had been paying attention to the process and hoped there would be more concrete plans, information, data, prioritized strategies to respond to at this time.

Luke Williams, Coordinator of Innovative Program Development, speaking solely for himself and not as part of Staff Assembly, acknowledged that SOU has a lot of unclassified administrators who are at-will employees. He asked the board to consider ending the practice of at-will and to adopt a policy that no one will be separated from the University except for cause.

Erik Palmer, Associate Professor of Communication, has been with SOU for eleven years. His main message was to advocate for the board to be more active in setting expectations around marketing. He does not believe he is the only member of the

faculty that shares the opinion that SOU can improve. Historically, SOU has not been very strategic about marketing or tracking data, calculating analytics, showing ROI in reaching target audiences, and growing the student body in a systematic way. He acknowledged that the data may be out there but perhaps the board could be more transparent and disciplined about sharing the information as it would be worthwhile. He believes marketing is an investment, it should generate higher returns than is put into it, and that SOU should be investing more.

Chair Santos invited others to make comments. Ms. Longhurst agreed with Mr. Palmer's comments regarding marketing. Changes in the education programs will increase enrollment but only if people know about them. Graduate programs in particular have suffered due to lack of marketing with the exception of those with Academic Partnerships. Departments are left to market without a lot of help, and don't have the time, funding, or expertise.

There being no further comments, Chair Santos thanked the trustees for making time for the listening session. He expressed appreciation for all the comments and said that this session would not be the end of the conversation.

Chair Santos adjourned the meeting at 4:25 p.m.

SOU Forward: University Realignment Plan



SOU FORWARD

University Realignment Plan

March 17, 2023





A VISION FOR THE FUTURE

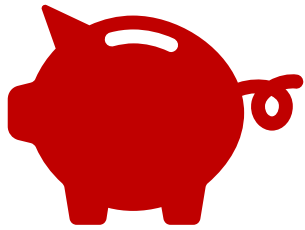
CHALLENGES, BUT ALSO
OPPORTUNITIES

BOTTOM LINE UP FRONT

Current model is unsustainable – Led to Unanimous Board Decision June 17, 2022



REQUIRED FISCAL MODEL: $R \geq C$



**Managing
Costs**



**Reimagining
Grants**



**Leveraging
Philanthropy**



**Diversifying
Revenue**

MANAGING COSTS



GUIDING PRINCIPLES

- Integrity
- Primacy of students and the university
- Transparency
- Compassion
- Long-term vision
- JEDI
- Universality
- Humility
- Unity



TRANSPARENCY

- Faculty Senate
- Staff Assembly
- Students/ASSOU
- APSOU
- SEIU
- Alumni
- Donors
- Board of Trustees
- Community
- Legislature
- SOU Foundation
- HECC
- Higher Ed partners
- K12 partners

HOW WE GOT HERE

If We Do Nothing

- 30% **enrollment** decline over 10 years (50% of revenue is tuition)
- 58% increase in **government mandates**
- **State funding** below current service level
- PERS **retirement obligation** jumps from \$7M to \$11M (projected over 5 years)
- **Healthcare** cost jumps from \$7M to \$9.5M (projected over 5 years)

	Revenue	Cost	Deficit
2022-23	\$ 61.2 M	\$ 62.5 M	\$ -1.3 M*
2023-24	\$ 65.1 M	\$ 70.0 M	\$ -4.9 M
2024-25	\$ 65.6 M	\$ 73.7 M	\$ -8.1 M
2025-26	\$ 66.4 M	\$ 79.7 M	\$ -13.3 M
2026-27	\$ 67.2 M	\$ 81.8 M	\$ -14.6 M

85% OF OUR COSTS ARE INVESTMENTS IN OUR PEOPLE

*includes \$3.6 M in one-time cuts

SOLVING FOR THE FUTURE

Implementation of Cost Realignment

- Reorganization, process improvement, and program adjustments across the university
- 81.83 FTE reduction

	Revenue	Cost	Net	Ending Fund Balance	% Operating Revenue
2023-24	\$ 64.6 M	\$ 63.3 M	\$ 1.3 M	\$ 6.5 M	10.00%
2024-25	\$ 67.1 M	\$ 64.7 M	\$ 2.4 M	\$ 8.9 M	13.27%
2025-26	\$ 67.8 M	\$ 67.5 M	\$ 0.3 M	\$ 9.2 M	13.56%
2026-27	\$ 70.1 M	\$ 68.7 M	\$ 1.4 M	\$ 10.7 M	15.26%

85% OF OUR COSTS ARE INVESTMENTS IN OUR PEOPLE

COMPARISON

Doing Nothing vs. Cost Realignment

- Reorganization, process improvement, and program adjustments across the university
- 81.83 FTE reduction

	Revenue	Cost	Doing Nothing	Implement Cost Realignment
2023-24	\$ 64.6 M	\$ 63.3 M	\$ -4.9 M	\$ 1.3 M
2024-25	\$ 67.1 M	\$ 64.7 M	\$ -8.1 M	\$ 2.4 M
2025-26	\$ 67.8 M	\$ 67.5 M	\$ -13.3 M	\$ 0.3 M
2026-27	\$ 70.1 M	\$ 68.7 M	\$ -14.6 M	\$ 1.4 M

**85% OF OUR COSTS ARE
INVESTMENTS IN OUR PEOPLE**

COST MANAGEMENT RECOMMENDATION

- Reorganization, process improvement, and program adjustments across the university
- 81.83 FTE reduction (13% of workforce)

	Faculty	Unclassified	Classified	TOTALS
Vacancies	6.24	12.55	17.35	44%
Volunteer Reductions	.71	1.00		2%
Retirements	14.40	2.00	1.00	22%
Impacted Employees	5.68*	9.20	11.70	32%
TOTAL	27.03	24.75	30.05	81.83
% of FTE Reductions	33%	30%	37%	100%

*includes non-renewable positions

ACADEMIC AFFAIRS

- Reduce academic divisions and directors from 7 to 4
- Revisit academic department model, combining small programs (saves chair release time)
(Department of ...)
- Continue academic program redesign
- Discontinue master's degree in Environmental Education (teach out major)

Area	FTE
VP office and graduate studies	1.30
Business Communication & Environment	5.00
Education, Leadership, Health & Humanities	6.37
Oregon Center for the Arts	6.25
Social Sciences	5.23
STEM	5.58
Undergraduate Studies	1.00
University Library	2.00
TOTAL	32.73

FINANCE & ADMINISTRATION

- Transform business services and create efficiencies with transition to Workday
- Simplify IT support infrastructure
- Diversify facility management expenditures
- Reorganize housing administration
- Eliminate vacant positions

Area	FTE
VP office	.20
Budget and Planning	1.00
Business Services	12.00
Campus Public Safety	.20
Housing	1.25
Facilities Management	6.00
Human Resources	1.00
IT	1.50
TOTAL	23.15

ENROLLMENT MANAGEMENT & STUDENT AFFAIRS

- Reduce executive footprint from 5 to 4 VPs & restructure
- Eliminate vacant positions
- Create efficiencies in student affairs and admissions
- Maximize cross-functional coordination between recreation and athletics

Area	FTE
Vice President	1.00
Admissions	4.00
Financial Aid	4.00
Raider Student Services	6.45
Campus Recreation	1.00
Health and Wellness Center	.50
Student Life	2.80
TOTAL	19.75

UNIVERSITY ADVANCEMENT

- Discontinue Corporate Relations Program
- Reorganize financial staff support

Area	FTE
VP office	1.00
Corporate Relations	1.20
TOTAL	2.20

ATHLETICS

- Convert cheer and dance to Club sport
- Convert cycling to Club sport

Area	FTE
Administration	1.25
Cheer	1.00
Cycling	.75
Strength Training	1.00
TOTAL	4.00

UNIVERSALITY

Academic Affairs	FTE	Finance & Admin	FTE	EMSA	FTE	University Advancement	FTE	Athletics	FTE
VP office	1.30	VP office	.20	Vice President	1.00	VP office	1.00	Administration	1.25
BCE	5.00	Budget/Planning	1.00	Admissions	4.00	Corp Relations	1.20	Strength Training	1.00
ELHH	6.37	Business Services	12.00	Financial Aid	4.00			Cheer	1.00
OCA	6.25	Public Safety	.20	Raider Stud Serv	6.45			Cycling	.75
Social Sciences	5.23	Housing	1.25	Campus Rec	1.00				
STEM	5.58	Facilities Mgmt	6.00	Health Center	.50				
Und Studies	1.00	Human Resources	1.00	Student Life	2.80				
University Library	2.00	IT	1.50						
TOTALS	32.73		23.15		19.75		2.20		4.00

THE OTHER PLANKS



LEVERAGE PHILANTHROPIC INVESTMENTS

Dream big

Comprehensive campaign in progress

Invest in talent

Support academic programs

REIMAGINING GRANTS



Leverage federal/state resources

- Faculty research
- Student success initiatives
- New program initiatives



Change the model

- Dedicated support for faculty scholarship development
- Dedicated post-award management



Incentivize participants

- 5% to principal investigators, when full indirect costs are collected



AGGRESSIVELY PURSUE ENTREPRENEURIAL REVENUE PROJECTS

- Cascade Complex replacement project
- Solar
- University District
- Workday Training Center

THE PATH FORWARD



**Self-Care / Healing / Unity /
Creative Adjustments /
Workload**



Trusting Relationships

- Faculty Senate, Staff Assembly, ASSOU, APSOU, SEIU



Culture Shift

- Revenue \geq Cost
- Time value of decisions
- Expectations / Milestones / Metrics / ACTION
- Aspirations vs Budget Process³⁶



A VISION FOR THE FUTURE



THANK YOU

SO | Southern **OREGON**
U **UNIVERSITY**



FORWARD

SOUTHERN OREGON UNIVERSITY

Securing SOU's Future by Embracing a New Fiscal Paradigm

2023-24



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INTRODUCTION

Southern Oregon University's leaders and campus community are addressing an undeniable truth: the current fiscal path is unsustainable. As stewards of the university and with a directive from the SOU Board of Trustees to address the issues that have caused an ongoing structural deficit, university academic and administrative leaders developed **SOU FORWARD**, a four-plank realignment strategy to stabilize campus-wide operations by focusing on financial viability and strategic growth to meet the academic needs of future students, the region and state.

The focus of *Securing SOU's Future by Embracing a New Fiscal Paradigm* is cost management, the first plank of **SOU FORWARD**. In this document, we provide a framework and a working plan for SOU's path toward fiscal health and stability. By realigning institutional revenues and costs and diversifying its sources of revenue, the university can thrive.

This document is the product of many. Authorship, consultation, feedback, and a variety of other inputs were provided by Academic Division Directors, faculty members, classified and unclassified employees, and the executive leadership team. This document also benefits from the significant input of SOU's shared governance partners, our two union partners, and the broader campus community—all of whom have engaged with open hearts and open minds in this work.



BACKGROUND

SOU must change the way it does business because the status quo is structurally flawed. Like each of Oregon's seven public universities, we have historically relied on a combination of state appropriations and tuition revenue to pay for most operations. But the proportion of those two funding sources has flipped in recent decades—what used to be about a two-thirds share from the state and one-third from tuition is now the exact opposite. Students and their families have become overburdened, and we must not allow skyrocketing tuition to be the answer to current and future fiscal challenges.

We have completed several millions of dollars in budget reductions during the past several fiscal years—many of which resulted in one-time savings. However, the structural changes necessary to improve the university's long-term financial condition were not made. Without these changes, we will operate at a significant financial deficit in the 2026 fiscal year. **SOU FORWARD** proposes a path toward financial stability.

SOU FORWARD consists of four planks, the first of which is cost management. This plank requires painful decisions that affect a number of valued colleagues and will result in changes to all academic and administrative programs. We must make the difficult decisions about what we hold most dear, what is essential to our identity, and what we can live without.

The other three planks of the **SOU FORWARD** strategy will impact our fiscal structure in three very specific areas, and each is built on a foundation of creativity and optimism. Those planks call for us to

1. Reimagine support for projects funded by external granting agencies and organizations
2. Leverage an ongoing surge in philanthropic support
3. Diversify revenue sources by pursuing entrepreneurial opportunities

These last three planks—focusing on revenue diversification—are what makes **SOU FORWARD** fundamentally different from the cost reduction exercises conducted during two previous retrenchments. Further, **SOU FORWARD** seeks to change our institutional culture to include the time value of decision-making and setting clear expectations with included metrics, milestones, and actions as new projects are brought forward. When fully realized, these new revenue streams and cultural changes will enable us to avoid large, year-after-year tuition increases, grow strategically, meet future needs of the region and state, and potentially serve as a national model for public higher education funding.

We acknowledge the need to address workload among all our employees. While **SOU FORWARD** is built on optimism, we understand the imperative to review what we do and how we do it. We recognize that we cannot expect our employees to do more work with fewer resources. The work before us, therefore, must include an



analysis of our internal processes and workflows, a review of the policies and procedures that guide and—at times—impede our work, and robust dialogue about what we can stop doing as an institution.

SOU FORWARD STRATEGY



Cost Management | We must adopt a mindset of long-term fiscal stability by balancing our budget year after year (revenue is greater than or equal to cost) and building a robust reserve fund to manage through future external uncertainties. This work requires a variety of painful decisions that impact all academic and administrative programs and all employee groups. See remaining document (sections II - V below) for additional information.



Grants | Numerous funding opportunities are available from state, federal, foundations and other private entities for a variety of uses. Some may directly affect SOU's current expenditures, while others may allow us to augment or add value to existing programs. University Advancement's Office of Sponsored Programs is supporting faculty and staff who are actively pursuing and managing grants and other "sponsored" funding opportunities.



Philanthropy | We have achieved a series of fundraising records in recent years, and we have repositioned ourselves to continue its dynamic growth. The two single largest philanthropic gifts in the university's 150-year history were made in the last 12 months, and they cap a 125% increase in giving in five years. As the campus embarks on its inaugural comprehensive campaign, the opportunity for donors to support academic programs, faculty positions, and student services has never been greater. To be successful, we will need the entire campus community moving forward together—to support our fundraising priorities and bring new donors into our Raider family.



Revenue Diversification | Our efforts to explore entrepreneurial projects to diversify our revenue streams has caught the attention of our legislative and political leaders throughout the state. They are commenting publicly about the bold steps we are taking to manage our current reality and plan for the future.

The projects below are just the beginning; these current revenue projects are in the discovery phase and all are moving forward at various speeds.



Solar

- We are moving rapidly to put together a coalition of individuals and organizations to help us become the first public university in the country to produce all of its own daytime electricity on our campus. The savings we will achieve by this work will be transformative.

Senior Living Complex

- The idea of replacing Cascade Housing Complex with a senior living community is already generating lists of individuals who want to move into the facilities. Our goal is to create a living community that creates a unique synergy between its residents, SOU students, and the university.

University Business District

- The proposed University Business District at the corner of Walker Avenue and Ashland Street has the potential to ease the housing shortage in the city and support SOU students by bringing in businesses that cater to our students.

Workday Training Center

- We are learning a lot from our transition to Workday. We are working with the intent of becoming experts so that we may share our learnings with other organizations migrating to the platform; it is anticipated that many of Oregon's public colleges and universities will implement a new core information system in the coming years.

Continuous Improvement

- We will continue to rigorously improve our processes to achieve desired outcomes. For example, SOU actively supported changes to the Student Success and Completion Model (SSCM) in 2020 and is now leveraging current practices to bring in additional state funding. SOU made great strides to ensure that we are getting as much funding as possible from the SSCM working group process. And we will continue to pursue and refine revenue enhancement by: ensuring we are getting full credit for activities we are already doing; establishing new enrollment and degree practices that align well with the funding model; and working diligently to fully-capitalize on appropriate coding and data mechanisms. This work is already yielding a significant increase in funding allocation and will continue to grow moving forward.



COST MANAGEMENT GUIDING PRINCIPLES

As we began this challenging process, we recognized that we had no blueprints for this work and that any recommendation we made likely would be unpopular to someone. In an effort to keep us focused, we developed a set of principles based upon the university's core values as a means to guide our behavior throughout this process. We shared these principles with our campus community each time we met to review progress toward this recommendation. The guiding principles were and remain:

- Integrity
- Primacy of students and the university
- Transparency
- Compassion
- Long-term vision
- Justice/equity/diversity/inclusion
- Universality
- Humility
- Unity

Of all of the guiding principles, our campus community seemed to focus most on our effort to create transparency in our thinking and decision-making. In fall 2022, we posted qualitative and quantitative frameworks to be used by each of the university's five large areas. This was followed by extensive data collection and analysis, much of which was developed in tandem with a variety of stakeholder groups. This data was then posted for the community in December 2022 for review and comment (<https://sou.edu/president/next-steps/>). We also held four town hall events for employees and students between January–March where employees and students could offer their thoughts, ask questions, and seek clarity on a number of issues.

We put forward our best effort to be as transparent as possible as we were making decisions; however, we made the intentional decision to take the vast amount of data that had been collected and analyzed and translate it into a workable plan through a 'top-down' approach. We did, however—throughout the process—ask for plans, ideas, recommendations, and more, from the entire campus community. We took those inputs into consideration and used them to develop this recommendation. This overarching plan was shared with campus in February 2022. Ultimately, we recognize that the University President must make a final recommendation to the Board of Trustees, and this plan reflects our best thinking.



ASSUMPTIONS AND APPROACH

In any strategic endeavor, we assert that there are two indispensable questions that must be addressed:

1. What is our current environment (the strategic context within which we are operating)?
2. How do we make ourselves adaptable to uncertainty?


The environment is shaped by our fiscal challenges, to be sure, but also by the contracts with our union partners, the perspectives of shared governance leaders, the myriad of opinions from community partners, the expectations of state and local governments, and more. The uncertainty is rooted in our inability to determine (with precision) future trends in state funding, enrollment, retention, and so forth. Thus, the plan needed to minimize the impact to the student experience, explore strategic savings versus strategic costs, respect the contracts that we have with our APSOU and SEIU partners, and ultimately avoid a ‘cut-now then cut-more-later’ approach.

We are committed to taking great care in making the necessary and difficult proposed reductions in a manner that does not undermine our work in support of Strategic Direction IV—to create a diverse, equitable, inclusive community where all learners flourish (<https://sou.edu/president/the-sou-plan/>). Our increased enrollment of historically underrepresented students, our increased hire of historically underrepresented faculty and staff, and our development of current and future EDI-supporting philanthropic gifts have bolstered our efforts toward growing greater diversity, equity, and inclusion. Further sharpening our focus on JEDI efforts, we’ve appointed a Vice President for EDI and staffed the Office; conducted an institution-wide survey that sheds light on lived experiences of the university community; and developed responsive initiatives that address key findings, all of which represent significant momentum in advancing SD-IV.

The **SOU FORWARD** Plan strategically considers programmatic needs of the students it serves from all academic and administrative areas in the context of this momentum, and seeks to maintain and increase it for optimal impact on what is a transforming community. Moreover, and just as critical, **SOU FORWARD** takes care to apply its JEDI lens to this plan, in its solicitation of feedback, communication of the proposed reductions, and finally in how it will implement final decisions.

In our communication to individuals holding positions affected under **SOU FORWARD**, we took great care to provide clear, timely, and comprehensive information to allow individuals to make critical, life decisions. We also committed to mitigating the impact of reduction decisions in all ways reasonably possible.

Rather than a single-faceted approach to reductions (e.g., 15% institution wide cuts; last-in/first-out), proposed reductions under **SOU FORWARD** are mindful of the programmatic needs of our students and those who teach, administer, and support them. In this way, we position ourselves to maintain continuity of the program service



levels we provide and to develop a plan that does not inequitably burden those who remain in university employment. To that end, the three governing and two union associations, in partnership with university faculty and staff, are charged with considering how roles and functions can be reimagined, and how workloads can be reduced; how we can reasonably adjust expectations and create different ones; and find ways to invest in the person as well as the function toward a thriving, transforming community in which everyone can flourish.

In addition, the fiscal approach utilizes realistic assumptions for the future (in other words, we assume that a budget will be based on enrollment figures that follow recent trends). But that does not mean that we will not be aspirational and intentional about our future and strive for increased enrollment and retention. In the past three years, we have made significant improvements to our enrollment infrastructure placing SOU in a position to implement strategies that have grown and will continue to grow enrollment. Our recent data-sharing partnership agreements with nine school districts throughout the region, progress with transfer articulation with community college partners, funding formula success in the Student Success and Completion Model, and initial results from Demand Builder (expanding our pool of prospective students) are four examples that likely will help our enrollment picture moving forward. Initial Fall 2023 enrollment data suggest strong new freshmen enrollment growth, slight growth in new transfer students, and continuing student population stabilizing from periods of enrollment loss.

RECOMMENDATIONS

The five major units at the university developed recommendations to reduce expenditures and minimize the impact on students and academic and administrative program delivery. The result of the recommendations includes a reduction of employees, recognizing that 85% of our costs are investments in our people.

A Comparison: Doing Nothing vs. Cost Management

	REVENUE	COST	DOING NOTHING	IMPLEMENT COST MANAGEMENT PLAN
FY 2023-24	\$ 64.4 M	\$ 63.3 M	\$ -4.9 M	\$1.3 M
FY 2024-25	\$ 67.1 M	\$ 64.7 M	\$ -8.1 M	\$ 2.4 M
FY 2025-26	\$ 67.8 M	\$ 67.5 M	\$ -13.3 M	\$.3 M
FY 2026-27	\$ 70.1 M	\$ 68.7 M	\$ -14.6 M	\$ 1.4 M

Through reorganization, process improvement, and program adjustments across the university, our cost management plan recommends a reduction of 81.83 FTE, or 13% of our workforce.

Cost Management Recommendation: Workforce Reductions

	FACULTY	UNCLASSIFIED	CLASSIFIED	TOTALS
Vacancies	6.24	12.55	17.35	44%
Volunteer Reductions	.71	1.00		2%
Retirements	14.40	2.00	1.00	22%
Impacted Employees	5.68*	9.20	11.70	32%
TOTAL	27.03	24.75	30.05	81.83
% of FTE Reductions	33%	30%	37%	100%

*includes non-renewable positions



ACADEMIC AFFAIRS

For Academic Affairs, realignment planning centered on restructuring our current academic model from 7 Divisions to 4 Schools, strategically reducing program costs and identifying ways to generate additional revenue. Through a combination of retirements, resignations, voluntary FTE reductions, and “noticed” employees, the proposed plan results in savings—from 27.03 FTE in faculty and 5.7 FTE in classified and unclassified employees.

After developing a list of qualitative and quantitative criteria to help guide our decision-making (https://sou.edu/president/wp-content/uploads/sites/8/2023/01/draft_realignment_approach_academic-affairs-1.pdf), we gathered extensive data about each program. These data include academic program reviews, metric cards for each academic program (<https://sou.edu/president/next-steps/#metric-sheets>), responses to cost management questions from the academic support programs (<https://sou.edu/president/next-steps/#cost-management-questions>), and written responses from each program (<https://sou.edu/president/next-steps/#triangle-documents>) addressing how they contribute to the “Three Points of the Triangle”: SOU’s commitment to liberal arts and sciences education, regional responsiveness, and creativity and innovation. Using these data and the established criteria, we developed a plan that includes, but is not limited to, moving from seven academic Divisions to four (<https://sou.edu/president/wp-content/uploads/sites/8/2023/01/Draft-Proposed-Realignment-of-Academic-Divisions-2.2.pdf>) and making reductions in many academic programs.

As a regionally-responsive campus with a strong commitment to liberal arts and sciences education, and in order to continue to best meet the needs of our students, our cost-reduction measures have focused almost exclusively on making reductions within programs rather than eliminating programs. Strategies for continuing to meet student needs despite program reductions include revising our curricula and offering fewer sections of courses for which there is less student demand. Additionally, we understand that these reductions will pose challenges related to workload. Therefore, it is important to note that the Provost's Office is committed to addressing any and all workload issues that will help to facilitate implementation of proposed changes to programs in each academic unit that follows.


Division: Business, Communication and the Environment (BCE)

The Division of Business, Communication, and the Environment continues to focus on innovative curriculum development, programmatic marketing, online delivery, and off-campus revenue generation. The three programs within the Division are among the most profitable departments on campus. However, the continued decline in enrollment demands that we act to reduce costs while simultaneously continuing our efforts to innovate.

Current initiatives led by BCE faculty, staff, and administration include efforts to institutionalize departmental-level marketing and recruitment, increase resources for external grants and contracts, continue to explore the potential for incorporating alternative methods of course delivery into the curriculum, and respond to regional needs through job market analysis. In addition, the reductions in BCE are a way to provide financial stability while simultaneously investing in new programs and concepts in areas such as social media innovation, sustainable agriculture, wildlife ecology, corporate sustainability, and e-sports.

Resource-sharing and collaborations will be created through a new School of Science and Business. Some benefits will be realized immediately through shared faculty resources across biology and environmental science. Additional benefits will be realized as the new school forms in Fall 2023. Ongoing efforts include improvements in academic advising, curriculum development, community-based learning, contracted services, grant-funded scholarship, and philanthropic development.

ACTION	RATIONALE
Eliminate Division Director position	Through the use of support staff and streamlined processes, the division of BCE is being eliminated. The departments of Business and ESPS will move to a new School of Science and Business. The CMC department will join colleagues in the arts. As a result, between the divisions of BCE and STEM.
Reduce the total number of faculty in Business	Business has experienced a steady decline in enrollment over the past 5 years. However, it has been difficult to reduce the total number of sections offered because the program is offered both online and in-person. This requires teaching sections of courses in both formats. Through the use of innovative teaching modalities, we will reduce the number of sections by offering courses as in-person, online synchronous, online asynchronous, and self-paced in one unified course. Business is additionally revisiting its curriculum as it strives to offer courses that appeal to, or provide resources for, a broader range of students. The School of Business will leave an open faculty line in marketing unfilled, will reduce one faculty line in management through retirement, and will eliminate positions in accounting and internship delivery through early retirements.
Reduce the total number of faculty in Environmental Science, Policy, and Sustainability (ESPS)	The total number of majors, certificates, and micro-credentials in this department continues to grow. Multiple new programs are currently under review that will expand offerings at both the undergraduate and graduate level. However, as a result of changes to our general education curriculum,



	we anticipate as much as a 75% reduction in lower-division offerings to non-majors.
Reduce faculty FTE in Communication, Media & Cinema (CMC)	Through a voluntary reduction in FTE, CMC will slightly reduce faculty FTE. This reduction is in an area of the department that has seen some moderate decline in enrollment over the past five years.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Professor/ Business	1.00	Faculty
Senior Instructor 1/ Business	0.67	Faculty
Senior Instructor 1/ Business	1.00	Faculty
Instructor/ Business	1.00	Faculty
Assistant Professor/ Communication	0.33	Faculty
Instructor/ Environ Sci & Pol	1.00	Faculty
TOTAL	5.00	


Revenue Considerations

Modify internship requirements and hire internship coordinator: Some institutions have leveraged their students as essential human resources for community organizations and businesses. In this model, the institution develops relationships with businesses or organizations that lead to internships or externships. By further expanding on this possibility at SOU, we would continue to collect tuition dollars for opportunities and for providing the framework.

Strengthen grant productivity: Several of our BCE faculty are bringing in more to the institution in indirect cost recovery through grants than they bring in through tuition revenue. We are proposing ways to release these faculty from some teaching responsibilities to expand grant writing and research development.

e-Sports Major: Annual revenue is estimated for the growth of our existing e-Sports Program into a major within business.

Institute for Applied Sustainability, LAD (Lithia Motors, Inc.) Credential Development: Using gift funds, we are building a credential for corporate executives in corporate sustainability. This credential will provide training to executives across the globe.



Expanded Master's Programs in Environmental Science: Highly successful grant and contract work in environmental science, policy, and sustainability has created the opportunity to create a graduate program in which all students are provided graduate assistantships. This allows us to capture some state funding while additionally adding to our growing research funds.


Division: Education, Leadership, Health, and Humanities (ELHH)

The ELHH Division has had a significant number of resignations, tenure relinquishments, and retirements. Within the next three years, potentially 11 faculty members will be leaving the Division and two year-long adjuncts have each been reduced by 0.25 FTE, while other faculty are requesting reduced FTE loads. Outdoor Adventure Leadership (OAL) was impacted most severely by COVID due to the nature of the program. All other programs were also greatly impacted, but were able to adapt more easily.

Prior to our current realignment work, World Languages & Cultures (WLC) had been most impacted by changes in the University Studies requirements for BA (versus BS) degrees. They most recently eliminated the French and Japanese programs. Spanish has been proactive in exploring new ways to make their program accessible by developing a Spanish for Medical Workers certificate, developing general education courses that are not taught in Spanish, and exploring other certificate ideas specific to other degree areas that would fit into students' programs due to the new general education requirements. Philosophy continues to coordinate the Campus Theme each year and is also developing attractive general education courses. English has been highlighting the diversity of opportunities available with an English degree, which supports the Oregon Writing Project, Advanced Southern Credit, and the Teach from Your Best Self project with support from Southern Oregon Education Service District (SOESD).

Education has seen the most significant reduction in personnel in the Division. By eliminating the one-year Master of Arts in Teaching (MAT) program, faculty will be available to teach the essential teacher preparation courses in the two-year MAT program. To better address the region's needs, an online option will be added to the two-year MAT program allowing local and remote students to meet as a cohort to support one another. The synchronous online format will make the program accessible to teachers and teacher candidates in the region's more rural areas. Additionally, the current Special Education (SPED) endorsement for teachers will be offered with an online option, similar to the MAT. The undergraduate teacher preparation program is also pursuing an online option and hopes to begin making it available by Fall 2024.

The teacher preparation programs require approval from the Teacher Standards and Practices Commission (TSPC), which constrains our ability to modify the curriculum. To increase the presence of developing adult learning professionals, the Education program is pursuing an undergraduate degree in Training & Development. There are few such programs in the country, so its reach could go beyond the region.



ACTION	RATIONALE
Eliminate the one-year MAT program	Offer a two-year Master of Arts in Teaching (MAT) program, which would be accessible to teachers currently on a restricted license and future teachers in rural areas.
Merge three small programs	The current English, Philosophy, and World Languages & Cultures (WLC) programs will be combined into one department, to be named later, and will still maintain their individual majors and minors.
Decrease faculty FTE	Enrollment has decreased, so there is less need for full-time faculty. However, adjuncts will be needed to teach Education courses required for licensure. The need is especially important for Special Education (SPED) and Literacy.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Education/600-Hour Appt	0.44	Faculty
Professor/ Education	1.00	Faculty
Associate Professor/ Education	0.53	Faculty
Professor/ English	0.39	Faculty
Associate Professor/Language	1.00	Faculty
Senior Instructor 1/ Language	1.00	Faculty
Senior Instructor 1/ Language	0.51	Faculty
Adjunct Instructor/Health & Exercise Science	0.25	Faculty
Adjunct Instructor / Outdoor Adv Leadership	0.25	Faculty
Associate Professor/ Philosophy	1.00	Faculty
TOTAL	6.37	



Revenue Considerations

A decrease in student enrollment allows us to accommodate a reduction in faculty. However, our efforts to attract and retain students continue. Education is planning to offer additional contract courses as professional development opportunities for area educators. We have scholarship funding for educators interested in pursuing the Foundations of School Mental and Behavioral Health micro-credential. We have made the MAT program and SPED endorsement available online so that they are accessible to teachers on restricted licenses and those in rural areas.

English has been offering events for regional teachers and students through the Oregon Writing Project, Academic Southern Credit, and Teach from Your Best Self initiatives.

Health & Exercise Science (HEX) has been working with other programs across campus and is exploring making lab resources available to community organizations/schools.

OAL has been conducting recruiting meetings and is active in industry-related organizations.

Philosophy is developing general education courses that will attract students, continuing to develop campus themes that will interest students, and re-starting their community Friends of Philosophy group.

WLC is continuing their popular and successful Summer Language Institute in Spanish. Faculty are developing general education courses that will offer students the opportunity to learn about different Spanish cultures to develop an interest in the language. Faculty are also exploring specialty micro-credentials and certificates that would be of specific interest to a degree program or programs.

Division: Oregon Center for the Arts (OCA)

The Oregon Center for the Arts at Southern Oregon University has demonstrated positive enrollment numbers this year over last year, but over the last five years its enrollments have declined. To reflect student reductions, the OCA has realigned several of its programs.

Music will voluntarily eliminate graduate and undergraduate programs in music performance as well as its music education concentration. These programs require substantial resources and with fewer students the programs are unable to generate enough support to maintain themselves. Although it should be noted that Music has had the greatest growth this year than it has had over the last five years, its numbers are far below what it was ten years ago. Music is shifting its instructional focus by retaining the BA/BS in Music and providing training in commercial music which will allow more students to participate with greater access to promising careers in the music industry.

For several years, the Theatre faculty have been planning realignment of their program to better prepare students for careers in the entertainment industry, but little progress was made in implementation. The university plan aligns well with Theatre's plan as it moves forward with necessary restructuring. With the loss of

Faculty FTE and prospective retirements, Theatre will adjust its program by reconfiguring some positions. There will also be additional support provided for the very successful Master of Theatre Studies position by providing the coordinator additional time for more effective planning and recruitment. Future retirements will create opportunities for strategic hiring over the next several years.

Creative Arts is eliminating an open position 1.0 faculty FTE in ceramics but that has secured the positions of the newly hired art faculty who have created excitement and enthusiasm for components of the program. Strategic plans are in place to fill the need for ceramics instruction which is very popular on campus involving guest visiting artists and artists-in-residence. Future retirements may provide opportunities to review the ceramics position as a viable option for a faculty addition.

ACTION	RATIONALE
Refocus Music Faculty FTE	Music is moving from a conservatory model of academy to a comprehensive music school model with new Certificates in Performance, Conducting, Popular Music, Music History and Theory, in addition to our pre-existing Certificate in Music Industry and Production. This will provide students with the preparation necessary to enter the music industry in all its forms, as well as to practice their art in music ensemble settings. The Master of Music in Performance and the Bachelor of Music with concentrations in Performance and Music Education will be discontinued; students currently in those programs will have a path to graduation. Three out of the seven full-time faculty have agreements for tenure relinquishment and retirement dates on or before December 31, 2025. The program will need to replace at least one of the retiring faculty, and we anticipate adding another specialist in the music industry and popular music history. These changes will streamline the program's offering, resulting in a highly focused and more competitive program that will attract more students.
Decrease Music Faculty FTE	By offering fewer applied music lessons and eliminating the Bachelor of Music with concentrations in Performance and Music Education, fewer courses are needed. This will NOT eliminate the Music major, but rather reposition the program for future growth and opportunity.
Decrease Art Faculty FTE	Creative Arts has an open position in Ceramics that is being filled this year by a year-long ceramics artist-in-residence. This year-long position will not be renewed and Ceramics will continue to be taught in part by our Sculpture/3D

	professor and in part by Visiting Artist Scholar Teachers (VAST). Ceramics is a popular course of study, and its continuation is important.
Refocus Theatre	Theatre Faculty have been strategizing ways to better train students not only for work in Theatre but for the creative entertainment industries. Theatre graduates have opportunities in film, video, gaming, concerts, special events, and more. In the university's proposed realignment plan, Theatre will revise positions to meet the needs of students and prepare them for future employment opportunities. The program will better align its offerings with student demand, and will remain a program of distinction in our region. Students will continue to have real-time experience in the development of and participation in a robust Theatre season.
Decrease Theatre Faculty and Staff FTE	With the refocus of the Theatre Department, the Technical Director, Lighting Design, and Costume Design and Construction positions will be reconfigured, aligning Theatre faculty positions with enrollment and structures at similar sized programs across the western United States. Retirements will provide opportunities for strategic hires within the next several years. A currently vacant part-time staff position will be eliminated with the removal of one of the auxiliary Theatre Programs, the Visiting High Schools Shakespeare Program.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Professor/ Art	1.00	Faculty
Professor/ Music	1.00	Faculty
Adjunct Instructor/ Music	0.60	Faculty
Professor/ Theatre Arts	1.00 (pending)	Faculty
Instructor/ Theatre Arts	1.00	Faculty
Professor/ Theatre Arts	0.25	Faculty
Associate Professor/ Theatre Arts	1.00	Faculty
Office Specialist 2	0.40	Classified
TOTAL	6.25	

Revenue Considerations

The OCA is housed in six university buildings across campus, containing desirable facilities and specialized equipment that could be made more available for use by the community, when not used by the university.

The OCA Box Office is desired to be used by outside performance groups and this could be made available through ticket fees to cover the expense of staff.

Division: Social Sciences (SS)

The Division of Social Sciences is composed of thirteen distinct academic programs and two research centers, which take a variety of forms. Under the proposed realignment plan, faculty reductions are scheduled to occur in Criminology & Criminal Justice, Economics, Political Science, Psychology, and Sociology & Anthropology. Additionally, upon the resignation of the Division's Student Success Coordinator, other Student Success Coordinators were reassigned to fill the need in Social Sciences.

Curricular reforms are necessary in several areas. The Division of Social Sciences will meet student needs through a combination of revised curriculum and, because there are fewer students, offering fewer course sections. A variety of strategies are being implemented. For example, some required criminal law courses in Criminology & Criminal Justice are being modified so that they may be taught by multiple educators within the program. Social Science chairs are discussing the potential for shared methods and career development courses. They are also discussing optimizing course modalities. The Political Science Program has voluntarily ended its major, replacing it with a new interdisciplinary major in Power & Politics.


Though quite lean, the Division of Social Sciences will continue to offer its full complement of majors, select minors, and an expanding array of certificate programs. Though some classes will necessarily be reduced, current and future students will continue to enjoy the opportunity to pursue a diverse array of academic programs. The Division is also poised to capitalize on SOU's renewed focus on grants and sponsored programs.

ACTION	RATIONALE
Eliminate the Political Science major, replacing it with a Power & Politics major; reduce the Political Science faculty	Political Science's major headcount has fluctuated between approximately the low-40s and high-60s over the past several years. With the onset of the pandemic, those numbers remained on the lower end of that range. Additionally, a first-year Assistant Professor resigned last academic year to take a position elsewhere, in part because courses continued to under-enroll, and another dual-appointment faculty member moved into the Division Director role. Recognizing the interdisciplinary diversity of expertise in political topics among the current SOU faculty, the existing major will be taught out with no new permanent faculty hires, and develop an

	interdisciplinary major focused on the study of politics titled Power & Politics.
Reduce the Economics faculty FTE	Student demand in Economics has not been sufficient to support the current level of faculty FTE. A reduction in FTE should meet student needs, and those of interdisciplinary partners, at current enrollment levels.
Reduce the Criminology & Criminal Justice (CCJ) faculty FTE	Major headcount in CCJ has declined over the past decade – a trend that predated the onset of the pandemic. Faculty reductions are designed to meet the current level of student demand.
Reduce the Sociology & Anthropology (SOAN) faculty FTE	All SOAN faculty contribute to at least one academic program outside of their home department. Faculty are able to cover curricular needs within the program by adjusting offerings.
Reduce the Psychology FTE	The Psychology major is the largest in the Division, and depends to some extent upon term-by-term faculty to meet existing student needs. The program is considering revisions to its core offerings since there is not a dedicated neuropsychologist on staff (there is a faculty member who can teach those courses, but who also has significant responsibilities elsewhere in the curriculum).
Curricular Revisions	Curricular revisions will necessarily take a variety of forms. Some Social Science chairs are exploring shared, common courses among some of their programs. Cross-listing and cross-referencing of courses has been used extensively in many Social Science programs, and is expanding, in an effort to maximize the impact and utility of individual course offerings. In other cases, courses and majors are being reformed to increase flexibility within the program.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Professor/ Criminology	0.13	Faculty
Professor/ Criminology	0.39	Faculty



Professor/ Economics	1.00	Faculty
Adjunct Assistant Professor/ Political Science	0.71	Faculty
Assistant Prof/ Psychology	1.00	Faculty
Professor/ Sociology-Anthropology	1.00	Faculty
Student Success Coordinator	1.00	Unclassified
TOTAL	5.23	

Revenue Considerations

There are also revenue-enhancement opportunities in the Social Sciences. The division contributes substantially to the dual-enrollment Advanced Southern Credit (ASC) program. ASC enrollments have rebounded after declining during the pandemic and in response to the local fires.

The Southern Oregon University Lab of Anthropology (SOULA) secures hundreds of thousands of dollars in contracted research annually, serving the region and the state, offering students opportunities to practice archeology, and generating a revenue stream.

On a somewhat smaller scale, the Southern Oregon University Research Center (SOURCE) also provides research support for clients in the region, pursues grant opportunities, and secures SOU revenue. Social Science programs are in the process of developing a series of new certificate programs that will appeal to student needs.


Division: Science, Technology, Engineering and Mathematics (STEM)

The changes in general education are significantly reducing demand in STEM courses. The recent changes to our General Education model will significantly reduce demand for STEM courses in some strands by 33% and in others 50%. Biology and Mathematics have seen the greatest declines due to their heavy general education service contribution over many decades. However, all STEM programs are reducing the number of sections offered as well as discontinuing some courses altogether. In anticipation of these reductions, several vacancies over the last 3 years in both Biology and Mathematics have already not been replaced as part of the normal planning process.

Furthermore, enrollment trends in STEM programs had been declining and were further impacted by COVID. All programs saw declines in class sizes, resulting in multiple low-enrolled courses, decreased need for adjunct instructors, and even challenges keeping faculty in some programs fully loaded. Due to national projections, a more rapid enrollment rebound in STEM fields was originally projected; however, this has been slower than anticipated. Faculty are actively involved in recruitment and student research, partnering with admissions, grants, SOU foundation, and community partners as they look to the future.

All STEM programs have routinely updated their curriculum, but substantial revisions to majors are in progress. Biology, Chemistry, and Mathematics are redesigning their curricula to deliver effective majors with reduced faculty. Each is looking at current trends and student career goals, in addition to regional needs in the redesign. Computer Science redesigned their program a few years ago due to retirements and hiring challenges at that time and is still refining that implementation.

ACTION	RATIONALE
Eliminate STEM Director	Division administration is being reduced to 4 Directors. This retirement is one of three and will not be replaced in reorganizing divisions from the original 7 to 4.
Discontinue Adjunct Instructor/Biology and not replace retiring Senior Instructor 2/Mathematics	Due to declining general education demand.
Discontinue current EE (Environmental Education) Master's Program but explore reimagined environmentally-oriented master's program	The EE program will serve current students until graduation in the excellent, but small, Environmental Education Master's program. Enrollments over the last 10 years ranged from 5-16 with high fluctuations in cohort size from year to year and recent decline (10-year average cohort size of 10.7, 5-year average of 9.6, and 3-year average of 7.3). A reimagined environmentally-oriented master's program could draw stronger enrollments and allow students to pursue a wider variety of career options, including environmental education, sustainability, ecology, and other environmental-oriented areas. The shared line in Biology and Environmental Education will be discontinued (incumbent resigned).
Do not replace vacant line for Professor/Biology	<p>Although one vacancy will not be replaced, two other vacancies are planned to be replaced in order to provide sufficient staffing in Biology:</p> <ul style="list-style-type: none"> • Human Anatomy & Physiology vacancy (professorial resignation) to be replaced by an instructor, and • Biology professorial position to fill gaps in revised biology curriculum, as dictated by enrollment.



Discontinue part-time Adjunct Instructor/Computer Science (CS) pending successful faculty search	This position has been used in various years to enable the program to continue to offer a robust curriculum even though the program experienced failed faculty searches. With a successful search this year (Fall 2023 start date), the additional staffing needs beyond ongoing faculty in CS should drop back to what has been normally covered with adjunct term-by-term instructors.
Discontinue Assistant Professor/Chemistry	Chemistry enrollment has declined since 2017-18, and the program has had ongoing challenges with low-enrolled upper-division courses for many years. Two faculty have similar specialties that should allow the remaining faculty member to cover that area of expertise in a revised program. Challenges will be honing curriculum and implementing some alternate year offerings to accommodate reduction in staff and to remedy low enrolled courses.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Adjunct Instructor/ Biology	1.00	Faculty
Professor/ Biology	1.00	Faculty
Assistant Professor/ Chemistry	1.00	Faculty
Adjunct Instructor/Computer Science	0.58	Faculty
Senior Instructor 2/ Mathematics	1.00	Faculty
Division Director position for STEM	1.00	Unclassified
TOTAL	5.58	



New Name: University Library and Undergraduate Studies

Departments: Undergraduate Studies (University Seminar, Bridge, Degree in Three, General Education);
Hannon Library

Both Undergraduate Studies and Hannon Library offer valuable academic support services for students. The synergies between the two service areas, Library and Seminar, are significant. UGS faculty prepare learners with the essential skills needed for a complex, diverse, and rapidly-changing world through programs and courses supporting general education foundations, including first-year seminars and a specialized curriculum for Oregon Bridge students, who are often first-generation students. Library faculty teach academic support courses that scaffold the additional skills for students needing extra support in a seminar. Library faculty and staff also support student learning and success by providing information resources and teaching students how to use them in courses that span the entire curriculum, meeting with students for in-depth research consultations, and continually seeking out the best resources and formats to support our curriculum.

With the reduction of 1.0 Library faculty FTE and an increase in the University Librarian's administrative duties, decisions about work reassignments will be made in consultation with the Library chair, and remaining faculty and staff. As the realignment process moves forward and workload issues are addressed, attention will be directed toward options included but not limited to the elimination of services, redistribution of duties, and/or other ways of allocating Library resources.

ACTION	RATIONALE
Combine Undergraduate Studies (UGS) with the Hannon Library	A structured integration of these two units/divisions will result in a more holistic academic support structure on campus, allowing for fuller integration of information literacy outcomes into the curriculum. This will create a place where students feel more welcomed and have their educational needs met efficiently, contributing to an engaged and student-centered college experience. Seminar and library faculty already work together. During the three parts of Seminar, students work in the library with a librarian and their instructor, becoming acquainted with the methods of researching, from exploring databases to utilizing library stacks. The units also collaborate to provide student engagement and outreach events, such as the Long Night Against Procrastination, in which librarians and UGS faculty advise, mentor, and tutor students as they work on final projects each term. Uniting the two units allows for deeper organization and structure, strengthening the student experience.

Decrease Faculty/Staff	<p>The Director position will be eliminated as part of the consolidation, and the majority of duties will be assumed by the University Librarian. UGS faculty and staff will report to the University Librarian.</p> <p>To reduce workload, the library is changing its service offerings, such as moving to mostly digital documents for Government Publications. These workload modifications will allow us to reconfigure staff positions to maintain core library services with fewer staff.</p>
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Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Eliminate Director for Division of UG Studies	1.00	Unclassified
UGS TOTAL	1.00	
Professor/Library	1.00	Faculty
Library staff member	1.00	Classified
LIBRARY TOTAL	2.00	

Division: Graduate Studies

Vacancies in a staff position and the Master in Interdisciplinary Studies (MIIS) graduate coordinator allowed us to realize a 1.3 FTE in savings. Based on an analysis, we determined we would sunset the existing MIIS graduate program, while retaining the option to implement revisions that reduce the administrative and instructional costs of the program at some future point in time. At this time, current demand for the program does not justify the administrative and instructional costs of maintaining it.

Similarly, with the departure of the Graduate Studies Program Specialist, we analyzed the position description and worked with individual graduate programs to streamline processes and to utilize faculty and/or graduate assistants to provide support previously offered by the GSPS. In addition, the elimination of two smaller graduate programs reduced the need for administrative support.



ACTION	RATIONALE
Eliminate Graduate Studies Program Specialist	Program reductions and contractions led to reduced need for administrative support.
Eliminate MIIS Graduate Coordinator position	Phase out of the current MIIS program


Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Administrative Program Spec	1.00	Classified
MIIS Graduate Coordinator	0.30	Unclassified
TOTAL	1.30	

FINANCE AND ADMINISTRATION

The Finance and Administration function area has a two-phased approach for implementing changes to the recurring cost base (<https://sou.edu/president/next-steps/#finance--administration-documents>). The first phase is to remove funded, unfilled positions (that can be vacated) from the budget. This would occur after the SOU Board of Trustees approves the recommended plan (for example, starting in May of 2023). The second phase is to implement the first module of the Core Information Replacement System (CISR). CISR implements Workday, and will involve technology and process changes, enabling better efficiency and effectiveness. The Go Live date for phase one is 1/1/2024 and quarterly program reviews will enable a full reorganization of Financial Services after 12 months.

ACTION	RATIONALE
Transform Financial Services (People, Process, Tools and Technology) with the implementation of Workday	<p>The legacy Banner ecosystem and paper processes for Business Services must be upgraded to enable a transformation of Financial Services (Payroll, the Service Center, Accounting, Budget Planning and Financial Reporting). The target is 10 FTE reduction.</p> <p>In addition, University Shared Services Enterprise (USSE) will be discontinued and three core functions moved in house (saving \$400k annually)</p> <p>These adjustments will improve processes, deliver better customer service and reduce recurring labor expenses.</p>
Implement CISR, phase one, enabling HR, Payroll and Financial process improvements	<p>The legacy Banner ecosystem and paper processes for human capital management (HR), Payroll and Business Services must be improved.</p>
Improve Facility Management by leveraging funds from other organizations; and enhance Facilities' Asset Management process (FCA model)	<p>Management vacancies will be vacated (in the near-term) and planning will continue to adopt an Asset Management framework. This work will enable us to better leverage each dollar. In addition, state bond funding and auxiliary funding will be maximized to reduce transfers (reimbursable expenses) from the E&G budget.</p>



Simplify IT and reduce cyber threat	A management reorganization occurred two years ago, and internal realignment allowed better focus on Information Security. Developing an Info Security Manager (ISM) is one aspect of cybersecurity risk identification and mitigation.
Maintain safety and a sense of personal security across campus; Improve Clery Program management; Leverage City of Ashland Emergency Manager in exchange for mutual use of LMP Emergency Operations Center	<p>Reorganization (circa Fall '22) eliminated the Assistant Director position and established a full time Clery Program manager to reduce risk of non-compliance.</p> <p>We have also removed the responsibility of emergency management from the Public Safety Director's position description to better focus on parking and safety.</p>
Reorganize Housing Administration to maximize net revenues	Two recent departures created an opportunity to revise position descriptions for front-office staff, clarifying coordinator role/responsibility, and reducing costs for this key self-supporting Auxiliary program, which transfers revenue into the E&G budget.
Enable CISR phase 2, smooth transition, flow and execution	Effective CISR project management will enable the student project module to be designed, configured and tested, effectively serving our students and faculty.

Impact on Personnel

The following listing of positions and reorganization plan for Finance and Administration detail Phase One and Phase Two:

Department	Position	FTE Reduction	Classification
Budget Office	Sr Financial Management Analyst	1.00	Unclassified
Facilities	Custodial Supervisor	1.00	Unclassified
	Asst Director of Operations	1.00	Unclassified
	Trades/Maintenance Worker 2	1.00	Classified
	Custodian (* -use aux. funding)	1.00	Classified
	Grounds Maintenance Worker 1*	1.00	Classified
	Grounds Maintenance Worker 2*	1.00	Classified
Human Resources	Class/Comp & Recruit Coord	1.00	Unclassified
Information Technology	Info Technology Consultant 3	0.50	Classified
	Computing Coordinator I	1.00	Classified
Campus Public Safety	Office Specialist 2	0.20	Classified
Housing	Custodian/Housing	1.00	Classified
	Asst Director of Conferences/ Operations	0.25	Unclassified
VP Office	Administrative Services Coordinator	0.20	Unclassified
Business Services	Business Svcs Accounting Mgr	1.00	Unclassified
	Revenue Agent 1	1.00	Classified
PHASE 2	Reorganize Financial Services using Workday	10.00	Combination of Unclassified and Classified (TBD)
TOTAL		23.15	

Revenue Considerations

There are continued opportunities to generate revenues that support E&G, Auxiliaries and Designated Operations Funds. For example, we hope to raise conference revenue to pre-pandemic levels. This directly benefits University Housing, and indirectly benefits E&G. Another example is found in the Print and Copy center. This service center is inward facing; but could explore other revenue sources.



ENROLLMENT MANAGEMENT & STUDENT AFFAIRS

The EMSA division applied the principles established by the university and reviewed each position for core services to students (<https://sou.edu/president/wp-content/uploads/sites/8/2023/02/draft-realignment-approach-enrollment-management-and-student-affairs-2.pdf>). Each area director reviewed our overarching student needs and determined how to meet those needs while also achieving cost savings. They also evaluated a series of risk factors for each of the proposed staff reductions. In some areas, work functions are being reassigned to existing staff members as described below.

Vice President's Office

ACTION	RATIONALE
Eliminate Vice President of Enrollment Management and Student Affairs position	The institution has made significant infrastructure changes to improve enrollment strategy and operations that now puts SOU on par with competitors. Incumbent VP is accelerating career goals and the position will not be filled.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Vice President for Enrollment and Student Affairs	1.00	Unclassified
TOTAL	1.00	

Admissions

ACTION	RATIONALE
Eliminate Office Support Specialist	Position responsibilities (reception, communications, student employee supervision, document processing, etc.) will be functionally re-imagined and absorbed in combination by Admissions Counselors, existing operations staff, and student employees.

Eliminate Portland Regional Admissions Counselor	Recruitment and territory management responsibilities will be redistributed by campus-based Admissions Counselors.
Eliminate Evaluation Specialist	This was a vacant line for an Evaluation Specialist.
Transition Native Nations Liaison position (previously funded by Admissions) into a new tribal outreach and relationship position	This position, while originally and continuously funded by Admissions, has evolved into a direct report in sole support of Native American Studies Program, and Youth Programs. Following an initial meeting with the current Native Nations Liaison and faculty members in the Native American Studies Program, our goal will be to craft a path forward by summer 2023.

In order to maintain core service levels, admissions will re-envision the role of Admissions Counselors and student employees in support of our front office and operation (reception, communication, document processing, admissions evaluation) needs. This will impact the Admissions Counselor role and time spent recruiting new students. Future technology advances with Workday and a new document imaging solution will streamline processes.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Administrative Program Assist	1.00	Classified
Native Nations Liaison	1.00	Unclassified
Office Specialist 2	1.00	Classified
Regional Admissions Counselor	1.00	Unclassified
TOTAL	4.00	

Financial Aid

ACTION	RATIONALE
Eliminate IT support	Due to the realignment and with the elimination of the IT support within the Financial Aid office, support from the IR/IT offices will continue to help the Financial Aid Office provide the needed data to our campus community.

Eliminate the VA/Scholarship Coordinator	The VA duties will be assigned to the Assistant Director and Director who were already serving as back up certifiers. An additional resource may include assistance from the Equity Coordinator for Veterans and Military Family Members. We anticipate that Veteran students will continue to have the financial aid support they require, and will maintain support from the Veterans' Resource Center.
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After reviewing the number of students who utilize Title IV aid at Southern Oregon University, the need for Financial Aid processors and those who directly oversee Title IV funding is where the most support is needed. With the elimination of the IT support position, all data needs from the Financial Aid Office will need to be supported by Information Technology and Institutional Research. The VA/Scholarship Coordinator position was created to focus solely on the certification of chapter benefits for Veteran students and their dependents. This position also included the SOSA application and awarding of scholarships. The SOSA process and awarding of scholarships will be managed by the Director and Assistant Director of Financial Aid.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Program Representative 1 (Vacant)	1.00	Classified
Program Representative 2 (Vacant)	1.00	Classified
Information Tech Consult 2	1.00	Classified
Fin Aid & Scholarship Coord	1.00	Unclassified
TOTAL	4.00	

Enrollment Management & Student Support

(Raider Student Services Operations, Registration & Records, Office of International Programs, Disability Resources/UCAM, TRIO SSS)

ACTION	RATIONALE
Eliminate Coordinator of Innovative Program Development	Eliminating the position will reduce available resources to support Navigate. Basic Navigate technical support will be reassigned by other team members - outreach, innovation, training, and advanced support of Navigate users will not be possible.

Eliminate one Raider Student Services (RSS) Student Services Associate	Direct student services will take longer. It is likely that RSS will need to continue to operate in a remote services fashion aside from peak start of term intervals. RSS back office staff will need to help support front office activities limiting the bandwidth for front office to assist backlog with back office. It is also possible that RSS will need to stop directly taking phone calls and instead rely almost entirely on email communication, thereby aligning service delivery with student demand.
Eliminate Academic Records Coordinator	This is the only position within Registration and Records that is truly cross-functional. As such, the duties can be reasonably spread across other positions, but as with all employee positions, workload analysis and process streamlining may be required.
Eliminate Office of International Programs Admissions Coordinator	Some duties of this position, especially international student admissions assessment, will need to be reassigned to other appropriate staff. OIP will need to sunset some current program functionality as a result.

Writ large, these impacted areas are actively seeking ways to refine processes in order to absorb this workload. For example, we will be proposing changes to how course scheduling occurs. Some services that are not mission-critical will need to be eliminated, some services will take longer to fulfill, and these offices will need to be exceptionally judicious with taking on any new projects. Focal points will have to hinge around compliance and essential services first and foremost.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
IEP & USEM TESOL (Vacant)	1.00	Unclassified
Office Specialist 1	0.45	Classified
Administrative Program Assist	1.00	Classified
Coord Innovative Pgm Develop	1.00	Unclassified
Administrative Program Assist	1.00	Classified
Administrative Program Assist	1.00	Classified
Program Representative 2	1.00	Classified
TOTAL	6.45	

Campus Recreation

ACTION	RATIONALE
Eliminate the Membership & Programs Coordinator position	The Membership & Programs Coordinator position became vacant in December 2022. The membership duties will be spread across the Assistant Director position (Operations & Marketing) and the Director position. Some programs will be more heavily led by instructors and student-leads.


With the elimination of the Membership & Programs Coordinator position, the membership and student-employee supervision duties are shifting to a redesigned Assistant Director position and some operations/equipment management duties are shifting to the Director position. Some programming duties will be shuffled to instructors and student-leads. This suppression will be reflected in the reduction of the RECPRG index, part of the Incidental Fee allocated by the Student Fee Allocation Committee (SFAC) within ASSOU.

Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Membership & Programs Coordinator	1.00	Unclassified
TOTAL	1.00	

Dean of Students Office/Student Life


ACTION	RATIONALE
Eliminate shared health promotion specialist position	Other positions (Care Coordinators, Conduct Coordinator, Associate Dean of Students, and Dean of Students) could attempt to provide the services. It could be possible if/when all of the other vacancies are filled. Vacant since Dec 2021
Eliminate Asst. Dir. of Student Life for Equity and Access	This position was created and implemented in August 2020 during the reorganization of Student Life. We anticipate moving the SJEC under the Vice President for EDI, so eliminating this position means the SJEC Coordinator will report directly to the VP. The reduction in an administrative position will not impact direct service to students. Vacant since August 31, 2022



Eliminate Office Specialist 2	This position has been vacant since September 2021 and was slated for elimination in Phase 2 of the reorganization proposed by the former Dean of Students in 2020. It is a student-focused position but the current duties will continue to be filled by the Coord. of Student Orgs and Events with support from the New Student Programs Coordinator and the Director of Student Activities. Vacant since June 30, 2022
Reduce SJEC Coordinators. to 10-month contracts	Student Activities summer programming is focused on registration events. Reduction of services during summer aligns with the reduction of the incidental fee for students enrolled in summer sessions. Identity-based activities during the summer will be covered by Student Activities; presence at registration events, resource referral, food pantry, and the veteran's lounge will be covered by the Dean of Students Office. Effective Jan 1, 2023
Reduce student employee wages and S&S	To recoup reduction in student employee wages any students employed by SULIFE must be eligible for Federal Work Study. Effective June 30, 2022
Relocate 100% Dir. of Student Activities/Stevenson Union salaries to STUAFD	This position is essential to operations and must be covered by the general fund. Effective June 30, 2022

The Student incidental fee process is happening now for AY 2023-2024 and estimated reductions to the incidental fee will be between \$500,000-\$800,000. In the area of Student Life, we have been holding positions vacant (N=4). This includes two of four positions in the Social Justice and Equity Center (Gender and Sexuality Justice Coordinator (vacant since September 2022) and Sustainability and Basic Needs Coordinator (vacant beginning March 20, 2023), one position in Student Activities (Coordinator for New Student Programs, vacant since October 2022), and one position within the Dean of Students/Director of Student Life Office (Coordinator for Student Life, Marketing, Engagement and Events, vacant since February 2023).

Once we know the incidental fee allocation (expected by end of April 2023) we will determine what reductions will need to be made. As with the 2021-2022 reductions we will try to minimize the impact to the student experience and ensure that any reductions or eliminations will not detract from SOU's Strategic Direction IV (SOU will create a diverse, equitable, inclusive community where learners flourish). Our programs and activities



help students have a sense of belonging, develop new friendships, and create a better community and world. They exist to better serve our students and always put students at the core of everything they do.

On the General Fund side, we have held the Coordinator of Career Connections position vacant and are using those salary savings to pay for a consultant to review and recommend a pathway forward for this department. The Health Promotions Specialist position has been vacant since December 2021.

A concern associated with the proposed reductions for this upcoming year and the reductions that have occurred in previous years is that the area of the Dean of Students/Student Life will be unable to provide the same quality of service. We are reviewing which services will need to be eliminated and determining how to adjust campus expectations related to timely response. A proposal is being developed based on the Career Connections consultants reports that will advocate for the reallocation of existing funds within Career Connections to expand career-related services for SOU students, alumni, and employers.

Impact on Personnel

Division / department	Planned FTE Reduction	Classification
Health Promotions Specialist	0.50	Unclassified
Office Specialist 2	0.50	Classified
Asst Dir SL 4 Equity & Access	1.00	Unclassified
Equity Coord. Vet Resources	0.20	Unclassified
Equity Coord. Sustain/Resource	0.20	Unclassified
Equity Coord. Racial/Justice	0.20	Unclassified
Equity Coord. G&S Justice	0.20	Unclassified
TOTAL	2.80	



UNIVERSITY ADVANCEMENT

University Advancement approached the realignment process by focusing on the programs funded by the state budget (<https://sou.edu/president/wp-content/uploads/sites/8/2023/01/Draft-realignment-approach-university-advancement.pdf>). With a comprehensive campaign underway, our goal was to maintain core strength in areas critical to ensuring the campaign's success. We also looked carefully at those offices staffed with a single professional and were cognizant of the impact these offices would have on the broader university if eliminated (<https://sou.edu/president/wp-content/uploads/sites/8/2023/01/University-Advancement-Data-Analysis-Project-Information.pdf>).

ACTION	RATIONALE
Discontinue Corporate Relations Program	The program develops relationships between the university and regional employers. It is being discontinued in an effort to maximize university resources and focus on those items that are core to the SOU mission.
Eliminate accounting manager position	This position was created in 2022 and is currently vacant.

The Corporate Relations Program was dropped about 2008 due to personnel cuts; regrowth began in 2016. Although there is revenue earned with this program, it is not self-supporting. The challenge will be the potential lack of connection with employers in the region who want to provide professional development opportunities for their employees using their local university. If there are business partners who are also philanthropic supporters, the fundraising team will become the lead connection point for the university.

By eliminating the accounting manager position, we will be slower in processing payments as it relates to sending foundation funds to the university, processing reimbursements, etc. Additionally, with just one remaining employee in the finance and administration area we are reverting to an organizational structure that demands constant monitoring related to internal controls.



Impact on Personnel

Position	FTE Reduction	Classification
Assistant Director for Corporate Relations	1.00	Unclassified
Associate Vice President for Government and Corporate Relations	.20	Unclassified
Accounting Manager	1.00	Unclassified
TOTAL	2.20	

INTERCOLLEGIATE ATHLETICS

Our goal was to identify cost savings that did not significantly reduce current numbers of student-athletes, thus minimizing the impact to SOU's enrollment. Athletic programs have provided a steady increase in enrollment for campus going from 353 to 432 student-athletes in five years. Since 2017, SCH for student-athletes has marked a 44.2% increase. Two of our newer programs—Cheer/Dance and Cycling—however, were in their first year as varsity sports and had not yet pulled in large rosters. Returning them to club status should still allow them potential for growth while saving the cost of fully funding the programs at the intercollegiate level.

Other savings were identified in a vacant position, shifting salary from the General Fund to private gift revenue, a classified adjustment, and numerous reductions to S&S and travel that will necessitate additional fundraising (https://sou.edu/president/wp-content/uploads/sites/8/2023/01/draft_realignment_approach_athletics-1.pdf).

ACTION	RATIONALE
Cheer, Dance and Cycling will move from fully funded varsity programs to Club status.	Savings will predominantly be in salaries for full-time coaches. (A small stipend for .23 FTE will be budgeted for each program to maintain a coaching presence).
Move .25 FTE for Wrestling from state funding to private funding.	This move is the result of a private gift to endow the head coach's position. This is a cost savings on the E&G side of the equation.
Eliminate Strength and Conditioning Coach position.	Position is currently vacant.
Move Athletic Grounds position to FMP Grounds crew.	Scope of athletic field work can be absorbed into the Grounds crew.

Along with providing a solid structure for the growth of Cheer, Dance and Cycling (and other club sports), Athletics will maintain its focus on the outstanding academic and competitive performance of all our intercollegiate student-athletes. In this crucial time for SOU, we will continue to be a source for dependable, diverse enrollment and retention at a financially viable level...and we will win championships doing it.



Impact on Personnel

Position	FTE Reduction	Classification
Competitive Cheer/Dance Head Coach	1.00	Unclassified
Wrestling Coach to gift funds	.25	Unclassified
Cycling Head Coach	.75	Unclassified
Head Coach, Strength and Conditioning	1.00	Unclassified
Grounds Maintenance Worker 2	1.00	Classified
TOTAL	4.00	



CONCLUSION

We approached this work with an appreciation for the complexity of the challenges, and humility in the understanding that there were no perfect or ‘right’ answers. The urgency with which we crafted this plan was driven by the diverging curves between revenues and costs and a desire to take the time needed to act with compassion for those whose positions are impacted by the recommendation.

The cost management piece of **SOU FORWARD** is just one piece of a broader strategy to repair the structural flaws in the university’s financial model that have resulted in recurring budget crises over the past 25 years, and to ensure continued access and academic success for our students. We have confidence that this strategic approach will help to secure the university’s future for generations.

We understand, and accept, that there will be many critiques of this recommendation, but at the same time we are united in our desire to move the institution forward in a fiscally sustainable way – maintaining our affordability and accessibility, so that we can continue our excellent service to the students for whom we were built to serve.

FORWARD

SOUTHERN OREGON UNIVERSITY

Public Comment

SOU Board of Trustees and Administration Realignment Plan Discussion

Future Meetings

Adjournment