



OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

June 13, 2024

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

FROM: Sabrina Prud'homme, University Board Secretary

RE: Notice of Regular Committee Meeting

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

Action items on the agenda include a consent agenda consisting of past meeting minutes and an enrollment dashboard. The committee also will act on new curriculum consisting of certificates programs in applied statistics, biochemistry, chemical analysis, chemistry, mathematics, mathematics education, single subject secondary teaching, and special education, added endorsement.

Reports on the agenda include a provost's report reviewing Academic Affairs, Student Affairs, and Enrollment initiatives; and updates on the Statewide Provost's Council and Behavioral Health . There will be a student affairs report and an enrollment management report to review the Fall 2024 Funnel Report, enrollment data, and a completions update.

Information and discussion items include an SOU Enrollment Council Update including the following committees of the council: Financial Aid; Recruitment and Marketing; Student Success and Retention; and Academic Program Planning. Updates also will be provided on SOU's Core Information System Replacement Project; the Free Application for Federal Student Aid (FAFSA); and SOU's Student Withdrawal Survey.

The meeting will occur as follows:

Thursday, June 20, 2024

12:00 p.m. to 3:30 p.m. (or until business concludes)

Visit governance.sou.edu for meeting materials.

To view the proceedings, visit <https://sou.zoom.us/j/82342515982> at the time of the meeting.

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

Public Comment

Members of the public who wish to provide live public comments during 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: trustees@sou.edu. Public comments also may be delivered by hand or mailed to SOU Board of Trustees, 1250 Siskiyou Boulevard, Churchill Hall, Room 107, Ashland, OR 97520.



Board of Trustees
Academic and Student Affairs Meeting
June 20, 2024

Call to Order / Roll / Declaration of a Quorum



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

**Thursday, June 20, 2024
12:00 p.m. – 3:30 p.m. (or until business concludes)
Meese Room, Hannon Library, SOU Campus
Webinar Link: <https://sou.zoom.us/j/82342515982>**

AGENDA

Persons wishing to provide live public comments shall sign up in advance or may provide written comments to trustees@sou.edu.
Please note: times are approximate and items may be taken out of order.

- | | | | |
|---------|----------|--|--|
| 5 min. | 1 | Call to Order/Roll/Declaration of a Quorum | Chair Brent Barry |
| | 1.1 | Welcome and Opening Remarks | |
| | 1.2 | Roll and Declaration of a Quorum | Sabrina Prud'homme,
SOU, Board Secretary |
| | 1.3 | Agenda Review | |
| | 2 | Public Comment | |
| 5 min. | 3 | Consent Agenda (Action) | |
| | 3.1 | April 18, 2024 Minutes | Chair Barry |
| | 3.2 | Enrollment Dashboard | |
| 15 min. | 4 | Provost's Report | Dr. Casey Shillam, SOU,
Provost and Vice President
for Academic and Student
Affairs |
| | 4.1 | Academic Affairs, Student Affairs, and Enrollment
Initiatives | |
| | 4.2 | Statewide Provosts' Council Update | |
| | 4.3 | Behavioral Health Update | |
| 10 min. | 5 | Student Affairs Report | Dr. Carrie Vath, SOU,
Assistant Vice President
and Dean of Students |
| 15 min. | 6 | Enrollment Management Report | |
| | 6.1 | Fall 2024 Funnel Report | Zac Olson, SOU, Executive
Director, Admissions and
Recruitment |

**Southern Oregon University
Board of Trustees
Academic and Student Affairs Committee Meeting
Thursday, June 20, 2024**

AGENDA (Continued)

- | | | | |
|---------|----------|--|---|
| | 6.2 | Review of Enrollment Data | Dr. Matt Stillman, SOU,
Assistant Vice President
for Enrollment
Management and
University Registrar |
| | 6.3 | Student Completions Update | |
| | 7 | Information, Discussion, and Action Items | |
| 15 min. | 7.1 | New Curriculum (Action) | Dr. Dan DeNeui, SOU,
Associate Provost and
Director of Graduate
Studies |
| | 7.1.1 | Certificate, Applied Statistics | |
| | 7.1.2 | Certificate, Biochemistry | |
| | 7.1.3 | Certificate, Chemical Analysis | |
| | 7.1.4 | Certificate, Chemistry | |
| | 7.1.5 | Certificate, Mathematics | |
| | 7.1.6 | Certificate, Mathematics Education | |
| | 7.1.7 | Certificate, Single Subject Secondary
Teaching | |
| | 7.1.8 | Certificate, Special Education, Added
Endorsement | |
| 15 min. | 7.2 | SOU Strategic Enrollment Council Update | Dr. Casey Shillam |
| | 7.2.1 | Financial Aid Committee | |
| | 7.2.2 | Recruitment and Marketing Committee | |
| | 7.2.3 | Student Success and Retention Committee | |
| | 7.2.4 | Academic Program Planning Committee | |
| | 7.3 | Core Information System Replacement Project
(CISR) Update | Hart Wilson, SOU, CISR
Project Manager |

**Southern Oregon University
Board of Trustees
Academic and Student Affairs Committee Meeting
Thursday, June 20, 2024**

AGENDA (Continued)

- | | | | |
|---------|----------|---|---|
| 10 min. | 7.4 | Free Application for Federal Student Aid Update | Dr. Matt Stillman;
Karinda Decker, SOU,
Director of Financial Aid |
| 15 min. | 7.5 | Student Withdrawal Survey Update | Dr. Carrie Vath; Dr. Matt
Stillman |
| 5 min. | 7.6 | Future Meetings | Chair Barry |
| | 8 | Adjournment | Chair Barry |

Public Comment

Consent Agenda (Action)

**Board of Trustees
Academic and Student Affairs Committee Meeting
Thursday, April 18, 2024**

MINUTES

Call to Order/Roll/Declaration of a Quorum

Chair Brent Barry called the meeting to order at 12:03 p.m. and welcomed attendees. He extended a special welcome to new trustees and committee members, Dr. Hala Schepman and Garima Sharma; Jessica LaBerge from Governor Kotek’s office, and SOU’s new provost, Dr. Casey Shillam.

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

Committee Members:

Brent Barry, Chair	Present	Jason Mendoza	Present
Iris Maria Chavez	Present	Hala Schepmann	Present
Debra Lee	Present	Garima Sharma (Non-Voting)	Present
Mimi Pieper	Present	Barry Thalden	Present

Other Trustees in Attendance:

President Rick Bailey, Danny Santos

Public Comment

No members of the public offered comments.

Consent Agenda

Trustee Sharma moved to approve the consent agenda consisting of minutes from the committee’s January 18, 2024, meeting and the enrollment dashboard. Trustee Pieper seconded the motion and it passed unanimously.

Provost’s Report

Chair Barry introduced Provost Shillam to the committee noting her professional accomplishments in nursing education, aging and health policy, government leadership, and her undergraduate time at SOU.

Provost Shillam thanked the chair and discussed the early days of her transition to SOU. She noted that Academic Affairs has been focused on curriculum development and approvals, as evidenced by the committee’s agenda for this meeting. She has attended dozens of meetings to listen and learn about what is working, points of pride, the impact of SOU Forward, challenges, opportunities, ways to support people’s work, and their goals in the upcoming years. As student affairs is rejoining academic affairs under, Dr. Shillam will be blending the structures of the two units to ensure a synthesized rather than an additive approach.

Regarding the Statewide Provost’s Council, Provost Shillam noted that the group continues its work on common course numbering (CCN) for future rulemaking purposes. Recommendations included that CCN courses have the same number of credits, with the level set at the minimum number of credit hours to achieve the learning outcomes for the maximum number of students.

Provost Shillam also updated the committee that the universities received \$4M in funding for behavioral health, of which, SOU will receive \$667K. Chair Barry commended Provost Shillam for her work in getting to know the community, her team, and her forward momentum. Some discussion ensued regarding Trustee Lee's recommendation to consider the new changes to the Oregon Health Plan in the Provost's analysis. Provost Shillam assured that this was included and welcomed further insight.

Student Affairs Report

Starting with organizational updates, Dr. Carrie Vath noted the following new hires: Kim Desimone, as Director of TRIO Programs; Ellie Debortoli, student affairs creative media coordinator; Clinton Lytle, Veteran's Resource Center Coordinator; and the associate dean position remains open.

Regarding SOU's First-Gen Forward program, Dr. Vath explained that SOU is one of four universities in Oregon with the distinction and she reviewed goals to improve, distribute, and assess lingo as a tool to help first-generation students; develop, implement, and assess imposter syndrome campaigns and workshops; and incorporate first-gen status as part of SOU's demographic dashboard. Trustee Pieper recommended marketing the program to the STEM fields.

Enrollment Management Report

Zac Olson explained that due to the difficulties and delays with Free Application for Federal Student Aid (FAFSA), FAFSA submissions nationwide are about 40 percent behind, and California reported 46 percent slower submissions. Thanks to the work of the SOU Office of Admissions, SOU is only down 9.2 percent in enrollment deposits at this time. Private and regional schools are in total down 65.2 percent in enrollment deposits.

Regarding winter, Dr. Matt Stillman noted that SOU's enrollment heading into the fall term hopefully will stabilize and that effects of the pipeline from COVID persist among continuing students; the pool of new and continuing students is expected to continue to rise. Core revenue from student credit hours is flat. Headcount is down less than 1 percent and full-time equivalency is down; however, changes are expected later in the term, primarily due to Advanced Southern Credit.

Dr. Stillman explained that retention is doing well: freshman cohort retention is up 2 percent; overall undergraduate retention is up fractionally; and the freshman cohort six-year graduation is up fractionally. Responding to trustee Thalden's comments about seeing better results from retention programs, Dr. Stillman discussed that the issue is a combination of inflation, tuition raising, federal aid not increasing, and tax issues; Provost Shillam added that there are organizational issues contributing to this. Additionally, the FAFSA delays remain concerning for retention. Much discussion ensued about the long-term implications of FAFSA and the difficulties in accessing aid.

Accreditation Update

Dr. Dan DeNeui explained that the final visit to SOU's accreditor, NWCCU, was on Jan 31, 2024. The accreditor commended SOU on the following: 1) the planning and development of

the new innovative, thoughtful, and student-centered general education model; 2) the prioritization of student access and success amidst the pandemic, wildfires, financial constraints, and other challenges; 3) the resiliency and commitment of faculty and staff to the institution and its students; and 4) President Bailey's bold, transparent action to address financial health and management.

The accreditor's recommendations were for SOU to: 1) demonstrate a continuous process to assess institutional effectiveness; 2) set goals and objectives to define mission fulfillment; 3) benchmark disaggregated student achievement and use the data to inform student achievement goals; 4) demonstrate the results to improve learning outcomes and support services; 5) publicize learning outcomes; and 6) create a regular and substantive interaction policy. President Bailey shared that the effort to fulfill these will require much effort but it will help SOU make better strategic decisions for the institution. Provost Shillam added that fulfilling these recommendations will foster continuous quality improvement and that SOU can use these recommendations to improve day-to-day practices.

Proposed New Curriculum (Action)

Dr. Dan DeNeui introduced two bachelor's degree programs and noted that while some of the 16 certificates are new, many of them are the conversion of minors to certificates. He shared that certificates are mutually beneficial for both students and SOU, as they allow students to build a better portfolio with credentials since the certificates are stackable, and they act as a great way to build students' resumes while they continue making progress toward a degree. These sixteen certificates that were included in the proposal and discussed were: biology; biomedical research; creative arts; digital journalism, environmental, horticulture; healthcare economics; honors college civic leadership and innovation; horticulture business; medical and clinical lab sciences; outdoor adventure leadership; physician's assistant and chiropractic; pre-counseling; pre-dental and pre-optometry; pre-medical; pre-nursing; and a graduate certificate in adult learning.

Dr. Vince Smith explained that the proposed biomedical sciences degree allows students a pathway to enter pre-professional fields and related disciplines such as biomedical research, and provides certificates along the way to demonstrate proficiency in a particular area. Faculty explained that the degree will create succinct and streamlined program that was not available previously without requiring a lot of extra coursework or that was only an advising pathway for some pre-professional programs. Trustee Schepmann recommended that the department work to notify and advise students on the different pathways to ensure clarity for students. Trustees discussed possible benefits to retention of the more efficient program. President Bailey commended the work of the faculty to meet students where they are and to provide these pathways for students in a relatively cost-neutral way. Discussing the benefits and expansion of SOU's pre-professional programming, Provost Shillam mentioned SOU's new pre-law partnership with Willamette University, which also gives students mentorship and guidance while at SOU and will send them intentionally to Willamette upon completion.

Dr. DeNeui noted that the bachelor of science degree in ecology and conservation leverages SOU faculty, much like the biomedical science degree. Jaime Trammel explained that the major is driven by marketing trends and is the perfect blending of SOU's Environmental Science and Policy and the Sustainability Programs, the degree is a truly integrated major.

Trustee Thalden moved to approve the resolution for the new bachelor's degrees and certificate programs. Trustee Lee seconded the motion, which was approved unanimously by the voting members.

Academic Year (AY) 2024-25 Tuition and Fees Recommendations

President Rick Bailey introduced the topic and praised the sophistication of SOU's tuition-setting process. Provost Shillam explained that she joined the Tuition Advisory Council (TAC) toward the end of the process and commended the council's heartfelt, serious, and thoughtful deliberations. Josh Lovern reviewed the TAC's process, starting with the TAC including education, modeling, deliberating to a recommendation to the president before it is presented to the board. He reviewed the compliance checklist noting that all relevant items have been checked. Responding to Board Chair Danny Santos' questions about the meaningful engagement of students, Provost Shillam explained that although all members may not have been present due to class schedules, the TAC always had student representatives present and the meeting schedule always aimed to maximize participation of all members. No decisions were made without a quorum and she had outreach with students to ensure every effort was made to get their input.

Mr. Lovern explained the undergraduate and graduate tuition rates per SCH, and the increase to undergraduate resident tuition of 5.99 percent. He also presented in-depth information explaining the mandatory enrollment fees (building debt-service, technology infrastructure, and student health fees including the LaClinica details), statues governing the processes for determining them, their 1.91 percent rate of increase for AY 24-25, and historical fee increases. Next, he explained the student incidental fees: general incidental, green tag, and recreation fees, which the Student Fee Budget Committee determined, ASSOU approved, and which the board's approval is needed to collect. The one-time matriculation fee increase is \$25 for fall 2025. The composite of AY 24-25 fees changing is 2.85 percent.

Lovern also discussed the cost of attendance including tuition, fees, housing, meal plans, books. Showing the composite of tuition and fees, SOU is competitive with Oregon and California schools with the fourth-lowest among the seven OPU's plus OSU Cascades. Altogether, the composite increase is 4.82 percent, below the 5 percent threshold.

Proposed Amendment to Assessment of Mandatory Student Fees

This item is the committee's first look at a proposal that is expected to be presented to the board in June for action. Josh Lovern and Dr. Matt Stillman presented the "single fee" idea to change the way the student fee is assessed. It is not a proposal to change the TAC or ASSOU's processes or budgets in determining the fees—just the way those fees are assessed and collected. Currently, numerous student fees are assessed flatly (in most cases). This proposal aims to modernize the way these fees are collected and ultimately, help SOU devise a fee structure that aligns better with how courses and programs are offered.

The goals of the concept are to fix the fee-related challenges associated with students simultaneously registered for in-person and online courses. Goals of the single fee also would be to maintain current revenue levels, make low-credit thresholds more affordable, increase access to non-traditional students, stabilize mandatory fee revenue, maintain fee solvency, provide for greater flexibility, improve transparency, simplify billing, and prepare for the Workday Student implementation.

Mr. Lovern and Dr. Stillman used the previous academic year to model maintaining revenue levels, referring to a chart comparing proposed fees with current actual fees for a comprehensive overview. The current revenue is \$8.58M and this new model is expected, conservatively, to bring in \$8.87M. Much discussion ensued among trustees about the analysis for in-state students, possible challenges with part-time students getting full-time accommodations, and possible skewing of those results. Concluding, President Bailey commended the work to modernize SOUs' approach to student fees.

Enrollment Metrics

President Bailey and Dr. Stillman introduced the board to a dynamic tool for tracking enrollment metrics, which is characterized by its adaptability, transcending the traditional year-by-year approach. This interactive framework seamlessly integrates multiple datasets across forthcoming years. Board Chair Santos questioned other factors in play such as retention, student credit hours, etc. President Bailey confirmed that those were accounted for in this model. Discussion ensued regarding the enthusiasm surrounding this tool, which promises to provide SOU with actionable metrics to guide decisions.

SOU Student Health and Wellness Center Transition to La Clinica

Dr. Carrie Vath presented updates for the current year, notably highlighting the adoption of La Clinica services for students commencing in September. Notable changes include students being billed directly or through their health insurance, rather than through their SOU bill. Additionally, appointments will be scheduled in person or via phone, with no online mechanism available. Registration paperwork will be provided in hard copy format and will require the presentation of an insurance card.

Efforts are underway to engage with prospective students and their families regarding these changes. Dr. Vath assured the board that all necessary communications will be prepared for dissemination ahead of the September transition. In response to inquiries concerning La Clinica's operations and services, Rob Patridge, general counsel, clarified that while La Clinica's primary focus will be on serving students, their licensing and contractual agreements do not preclude them from serving the general public.

Student Affairs Strategic Planning Priorities

Dr. Carrie Vath introduced the vision, mission, and values of SOU's Student Affairs unit. Upon arrival at SOU, Dr. Vath quickly oriented herself and her staff to understand students' needs. She discussed the vision, mission, and values established in the Student Affairs Strategic Plan. The four goals of the plan are to: 1) strengthen student affairs infrastructure; 2) cultivate environments that support a thriving community; 3) provide transformative learning experiences to enhance student engagement; and 4) promote engaged inclusivity.

To assess employed staff and student morale and help determine the next steps the National Survey of Student Engagement was administered to establish a baseline. They achieved a 53 percent response rate including a 100 percent response rate among professional staff. Respondents indicated the best thing about working in their departments was the support of work-life balance, interactions/connections with students, sportive team members, and autonomy and trust. Respondents also identified what could make working in their department better: professional development, salaries/wages, clearer work schedules, and

onboarding protocols. The next steps are for team members to be able to recite/memorize the vision, mission, and values; then, consider the values and ask if their department processes, and programs reflect those values. If not, they will determine what steps to take; barriers that must be overcome; share concerns with other areas; be willing to hear and reflect on constructive criticism; and help hold one another accountable. Concluding, Dr. Vath shared that they are creating an ethos, or “the characteristic spirit of a culture, era, or community as manifested in its beliefs and aspirations.” Trustee Thalden appreciated the enthusiasm, and commended the teamwork as well as Dr. Vath for not being afraid of a four-letter word: love.

Changes to the Free Application for Federal Student Aid: Impacts and Planning

Introducing the director of financial aid, Karinda Decker, President Bailey commended her team on their remarkable job for being on the front end of FASFA and positioning SOU ahead of other universities in its preparation for the changes, including processing of applications. Dr. Stillman thanked Ms. Decker and summarized with the recent changes to FASFA there are some long-term benefits: FASFA is simpler, Pell Grant eligibility has increased, and SOU is ahead of many competitors in terms of technical preparation and proactivity. There are concerns on a national level, that universities will likely see a negative enrollments next year; more students will delay decision-making and possibly take a gap year; there may be issues arising from the federal Department of Education; and although Pell eligibility has been increased, the award amounts have not.

President Bailey presented Karinda Decker with an SOU Service Excellence award coin for her exceptional handling of this national FAFSA crisis for SOU.

Chair Barry thanked Dr. Stillman and everyone for their efforts in alleviating as much stress as possible for students and their families by leading with “the L-O-V-E word.”

Future Meetings

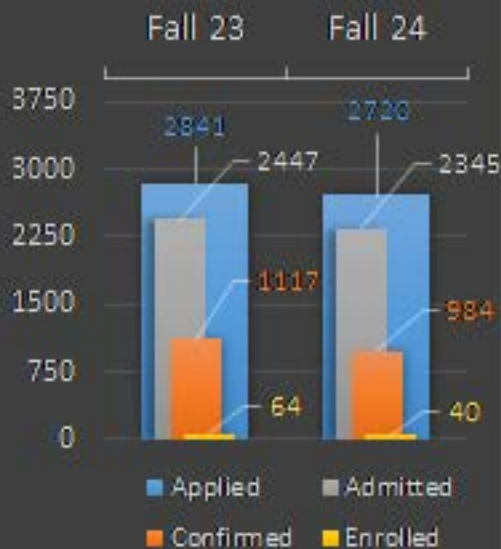
Chair Barry said the next meeting of the committee is scheduled to take place on June 20, 2024 at 12:00 p.m. Trustees who would like to suggest a specific item for a future meeting were asked to send them to the board secretary.

Adjournment

Chair Barry adjourned the meeting at 3:43 p.m.

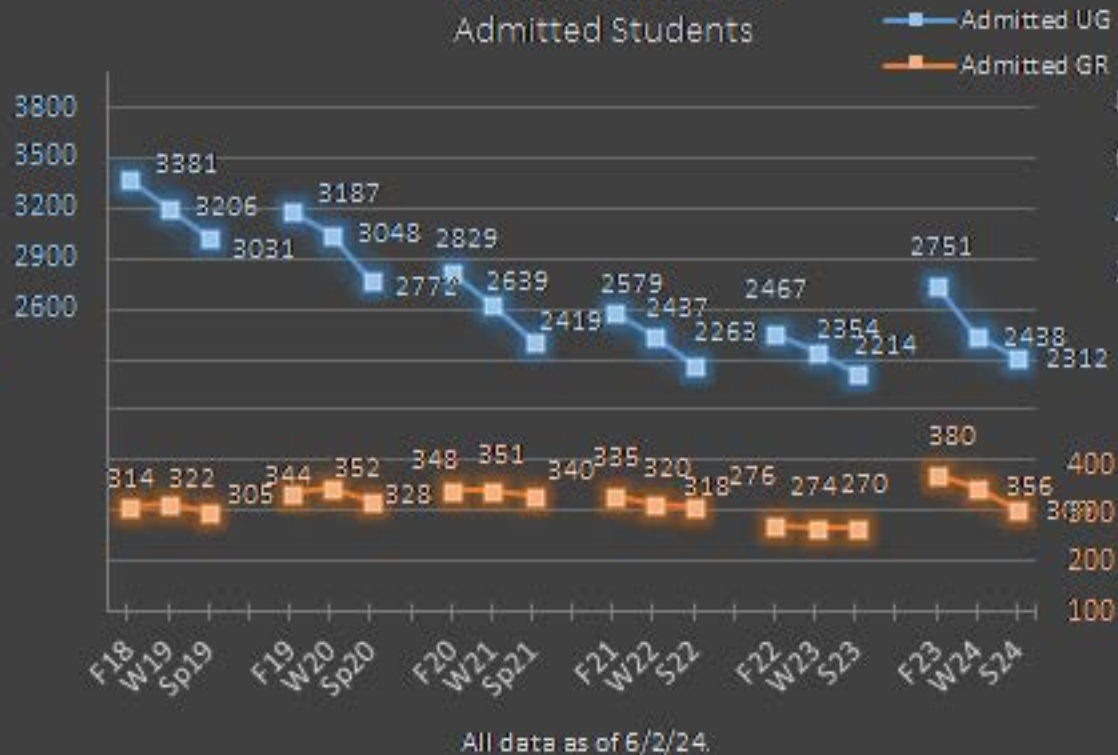
Admission Funnel

9 Weeks after Start of Term

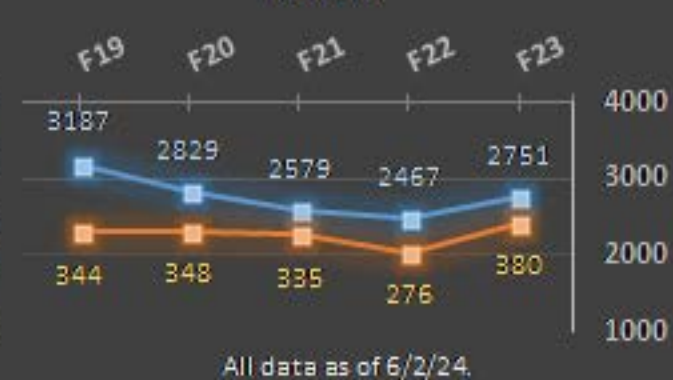


Academic Year FTE

Admitted Students



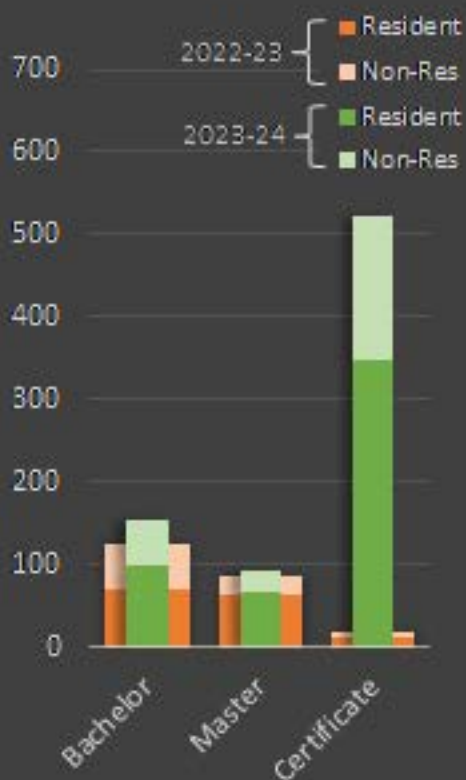
Fall FTE



All data as of 6/2/24.

Degrees Awarded

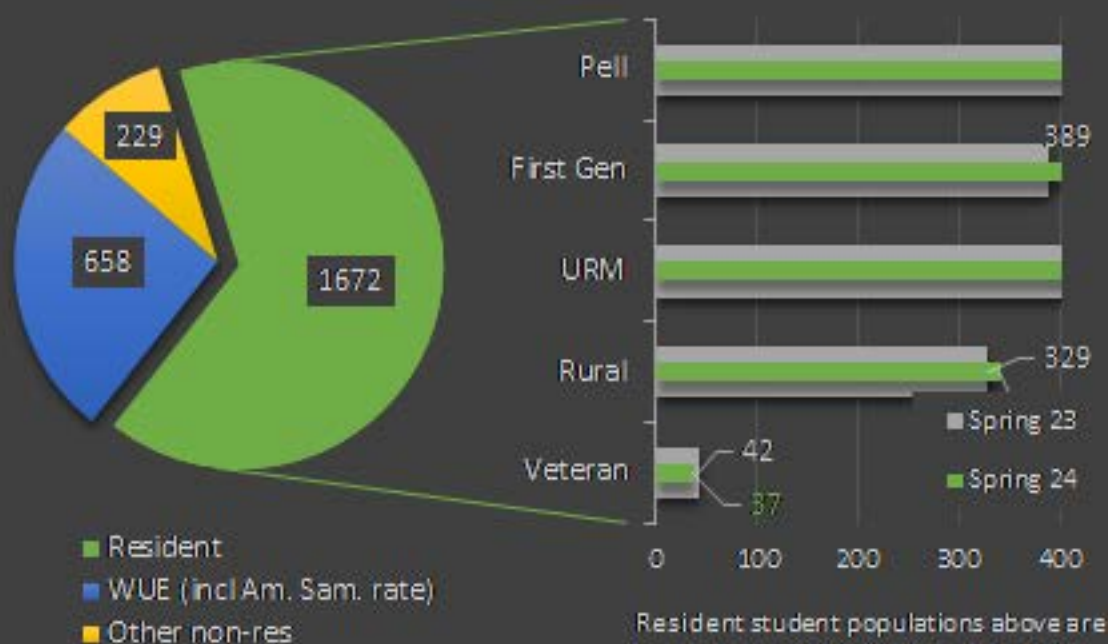
End of May



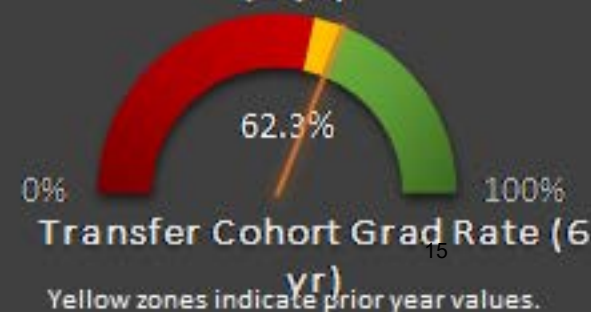
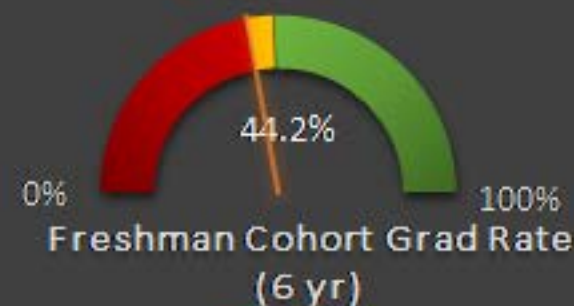
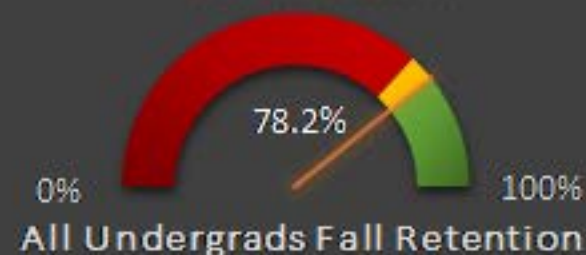
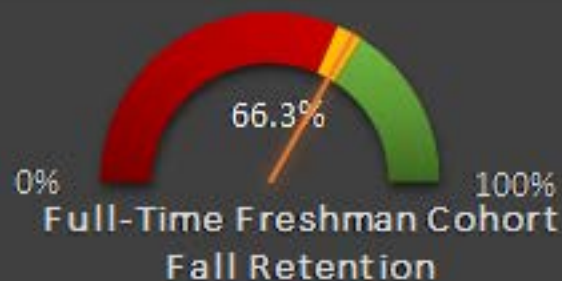
All data updated as of 6/2/2024

Spring 24 Admitted UG Students

9 Weeks After Start of Term

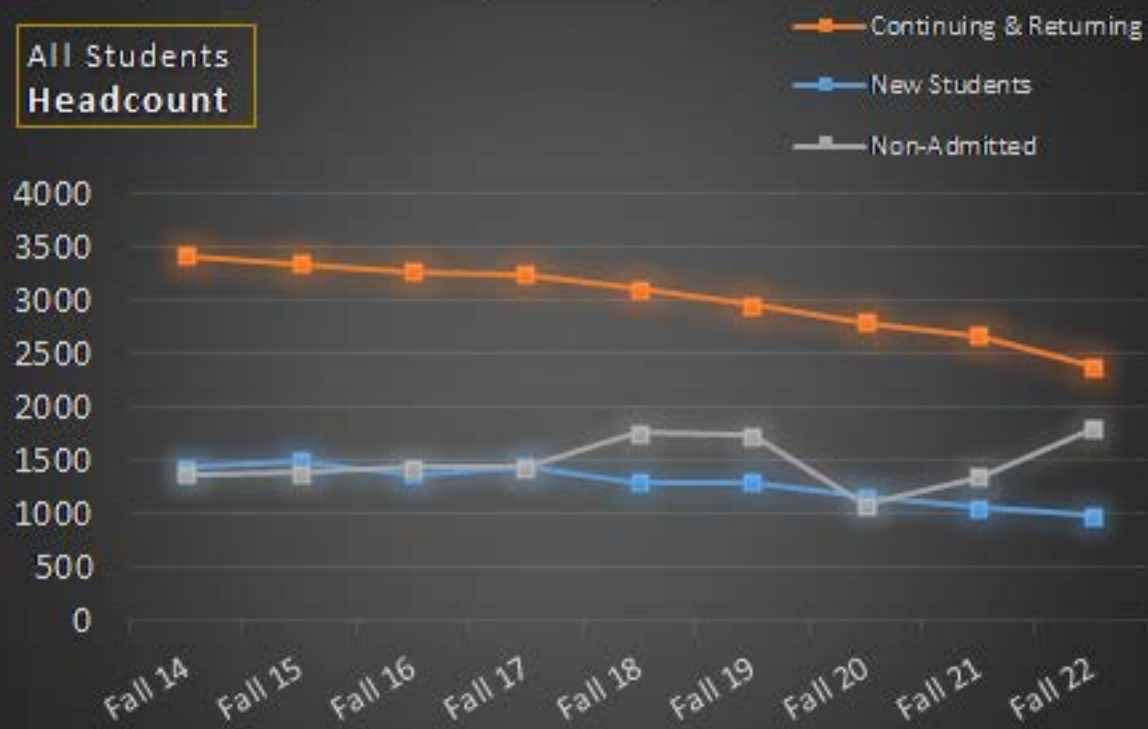


Resident student populations above are bonus areas within the funding model.

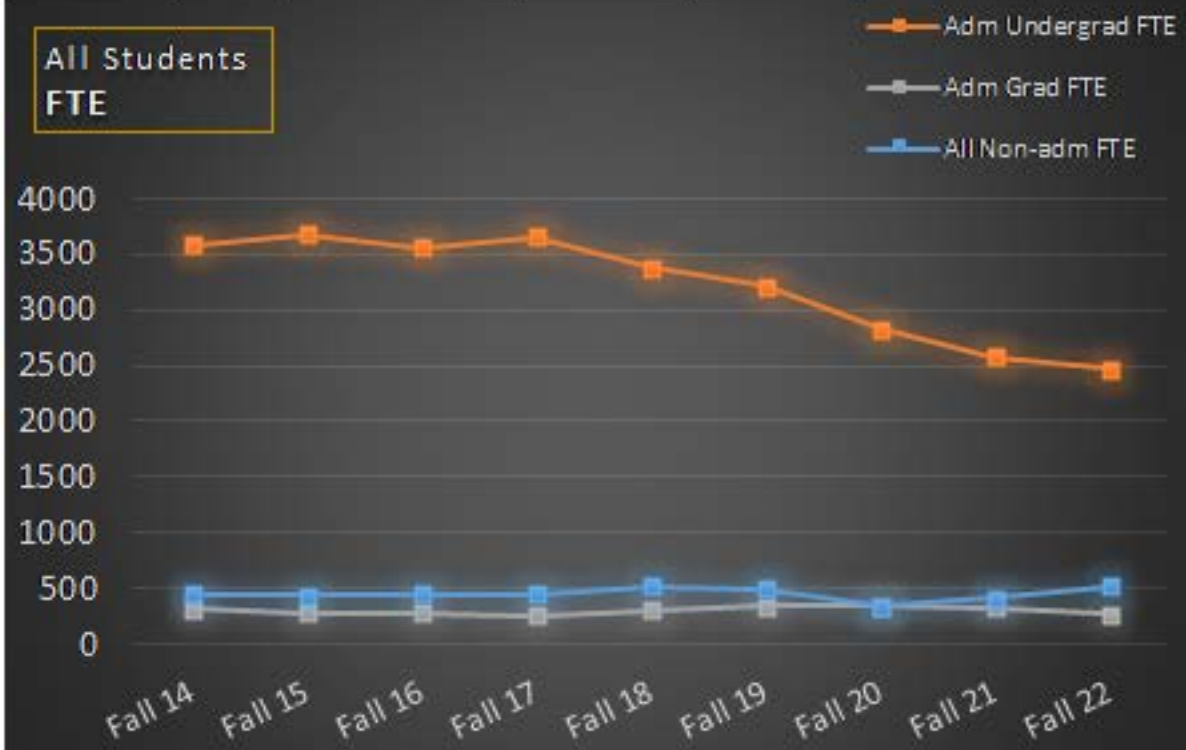


Yellow zones indicate prior year values.

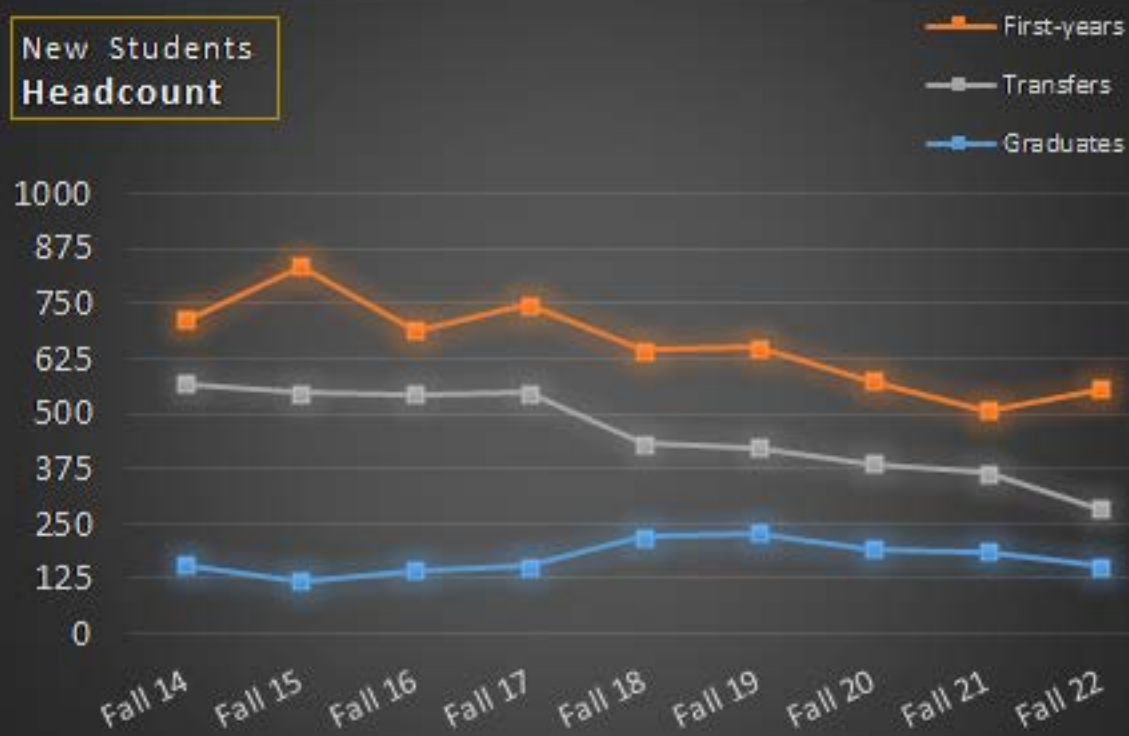
All Students Headcount



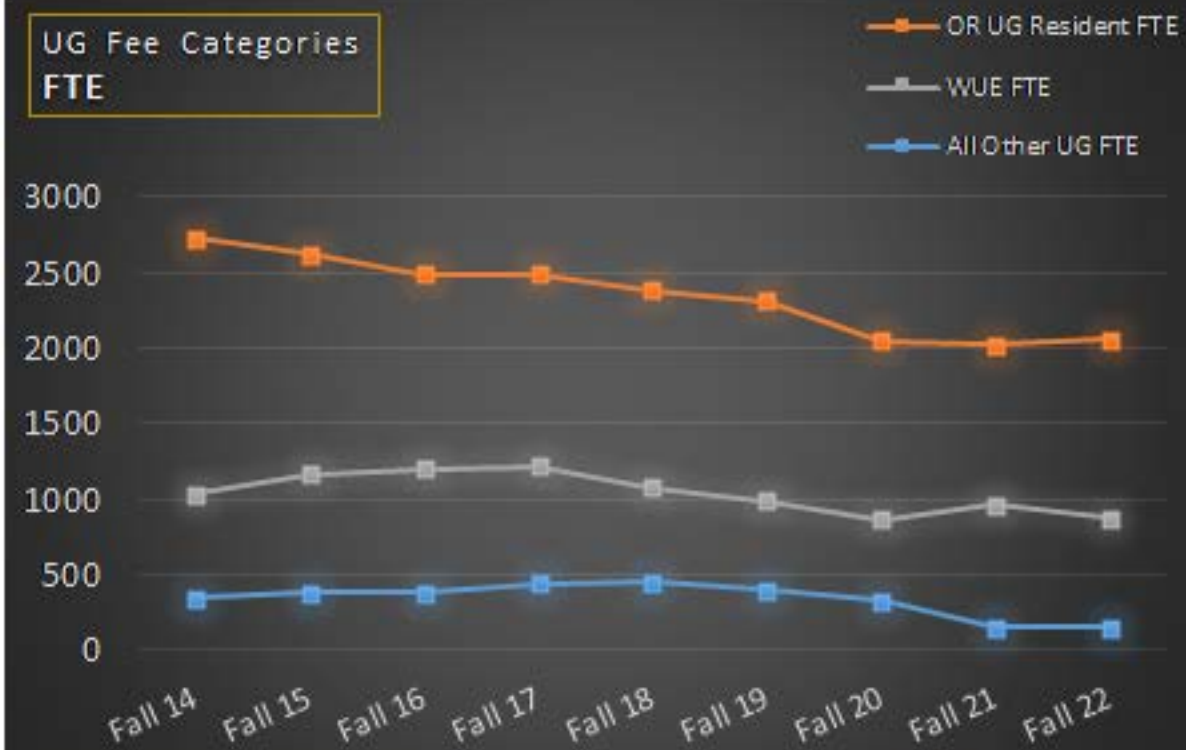
All Students FTE



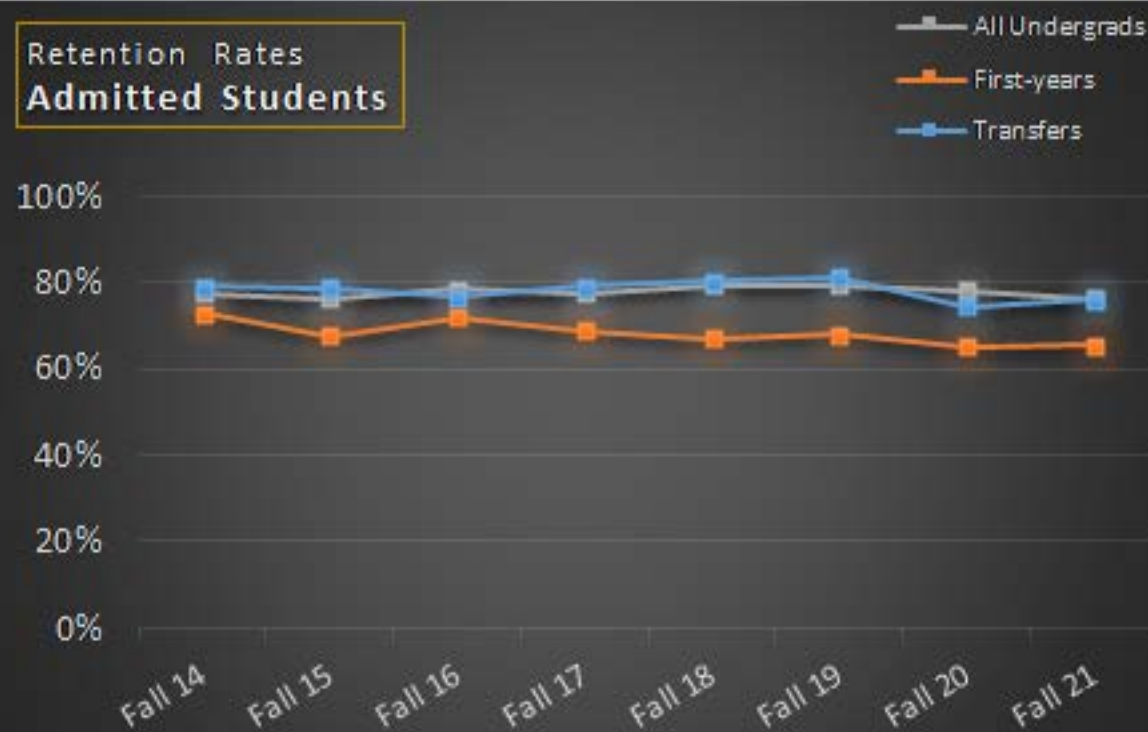
New Students Headcount



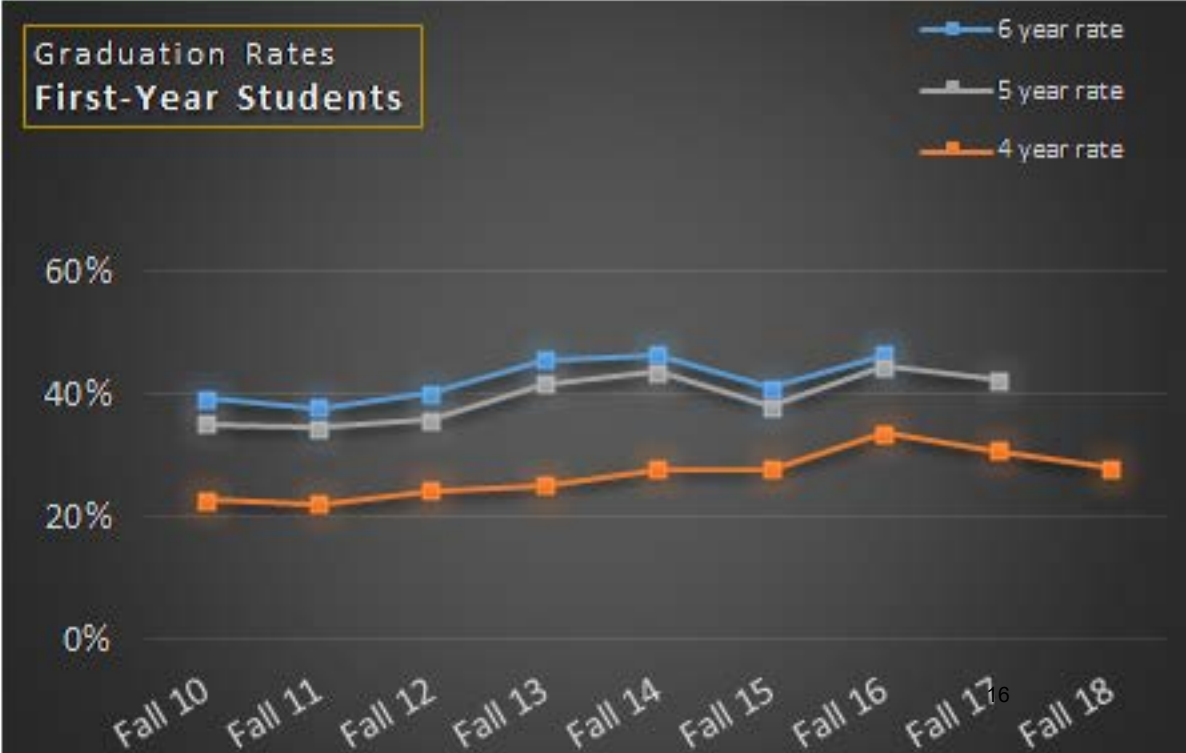
UG Fee Categories FTE



Retention Rates Admitted Students



Graduation Rates First-Year Students



Provost's Report

Academic Affairs Initiatives

Workload



Impact of SOU
Forward



Communication



Redundant /
Inefficient Systems

Integration of Academic Affairs



Campus Planning
Committee



Institutional
Budget Committee



Enrollment
Council

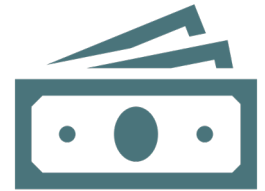
Research, Grants, & Philanthropy



Community Outreach
& Engagement



Sponsored Projects
Office



Fundraising

Student Affairs Initiatives

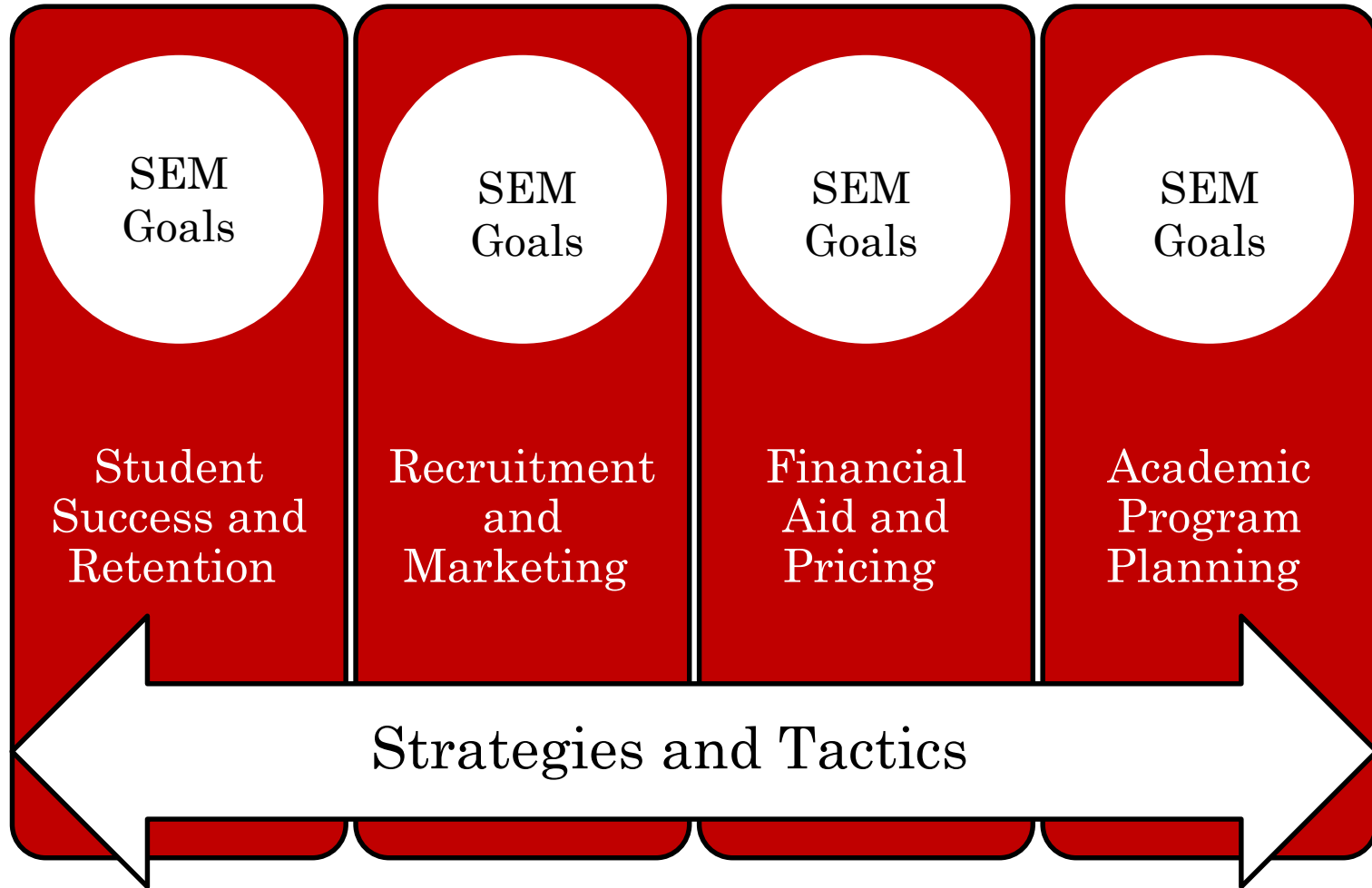
RCC Collaboration: Summer Workshop

Emphasize importance of partnerships and strategies for building and maintaining inter-institutional relationships between:

1. Student Affairs
2. Enrollment Management
3. Admissions

Enrollment Affairs Initiatives

Summer Goals: Build on 2023 Strategic Enrollment Management Plan



Statewide Provost's Council (SPC) Updates

Opportunities for Collaboration

- Possibilities for Dual Enrollment
- Behavioral Health
- Federal Reporting Regulations

Thank
you

Student Affairs Report

Student Affairs Report



June Pride Month



Juneteenth



July Disability Pride Month

Dr. Carrie Vath
June 20, 2024

Pride Points

- 35 Students inducted into the National Society of Leadership and Success (NSLS)
- 52 TRiO Graduates
- 20 Lavender Graduates
- 21 Veteran Graduates
- 37 Multicultural Coalition Graduates
- 82 Disability Resources Graduates
- 9 University Coaching & Mentoring Graduates



- **Jennifer Jones**, Selected as 2024 Outstanding Staff Award winner
*(Director of Disability Resources and UCAM **Aubrey Owens**, said, "You built the UCAM program from the ground up and oversaw its success for the past 12+ years. You know every single UCAM student (approximately 58) personally and their struggles and hopes for their time at SOU." She concluded by stating, "You innovate regularly, seeking ways to make the program more affordable and accessible to all students who wish to participate. You truly are the heartbeat of this program and its success!" Thank you for all you do for SOU!)*

Summer Projects

- Annual Program Reviews
- Professional Development
- Submission of TRiO Grant
- Office Relocations
- La Clinica Transition



U.S. Department of Education

Student Loans | Grants

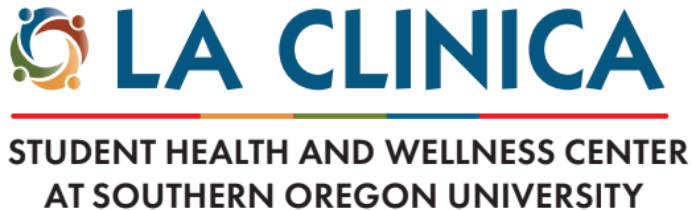
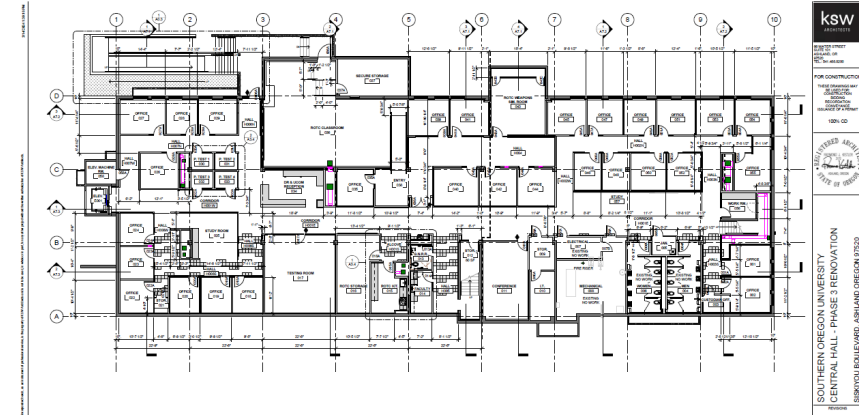
Student Support Services Program

- Purpose
- Eligibility
- Applicant Info
- Awards
- Performance
- Funding Status
- Laws, Regs, & Guidance
- Resources
- FAQs
- Contacts

Office of Postsecondary Education Home >>

Purpose

Program Office: Federal TRIO Programs
CFDA Number: 84.042
Program Type: Discretionary/Competitive Grants
Also Known As: SSS, TRIO (SSS is one of eight TRIO programs.)



Enrollment Management Report



Admissions & Enrollment Update

SOU Board of Trustees

Academic & Student Affairs Committee

June 20th, 2024

Zac Olson, Executive Director of Admissions & Recruitment

Dr. Matt Stillman, AVP for Enrol. Mgmt. & University Registrar

Funnel Report: New Applicant Headcount by Student Type
Fall 2023 Week Ending 6/4/23 vs. Fall 2024 Week Ending 6/2/24
16 Weeks Before Start of Term

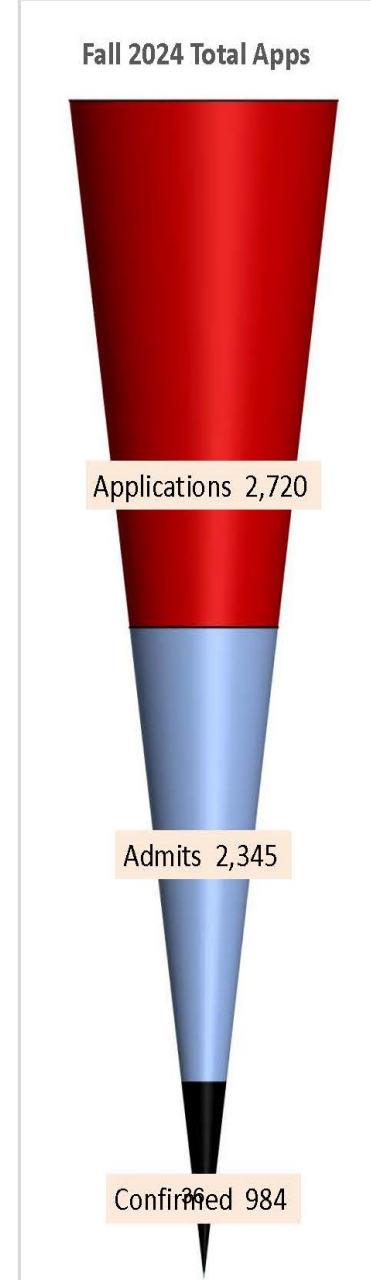
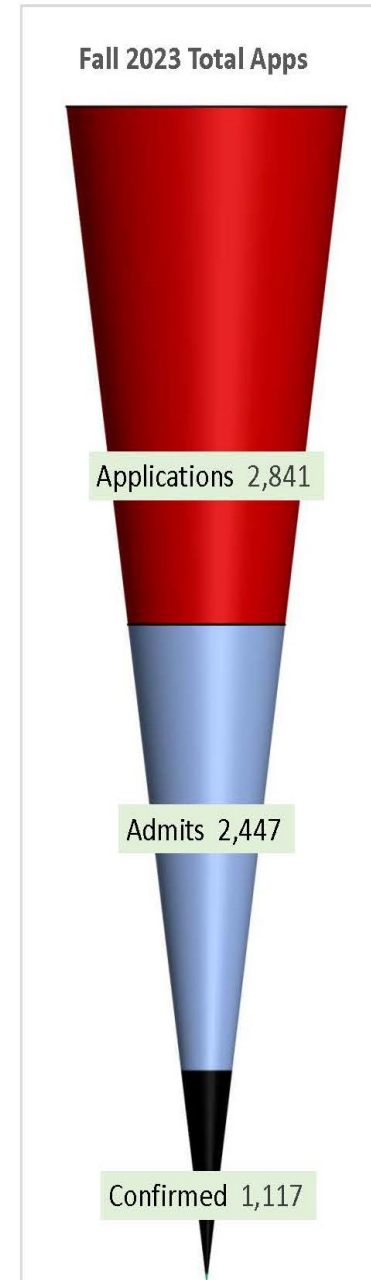
Fall 2024
 New Student
 Funnel:
 16 Weeks
 Before Start of
 Term

Applications				
Student Type	Fall 2023	Fall 2024	Change	% Change
Freshmen - Resident	1,079	1,109	30	2.8%
Freshmen - Nonresident	1,104	1,010	-94	-8.5%
Transfer - Resident	232	198	-34	-14.7%
Transfer - Nonresident	205	166	-39	-19.0%
Postbacs/Grads	221	237	16	7.2%
Total Apps	2,841	2,720	-121	-4.3%

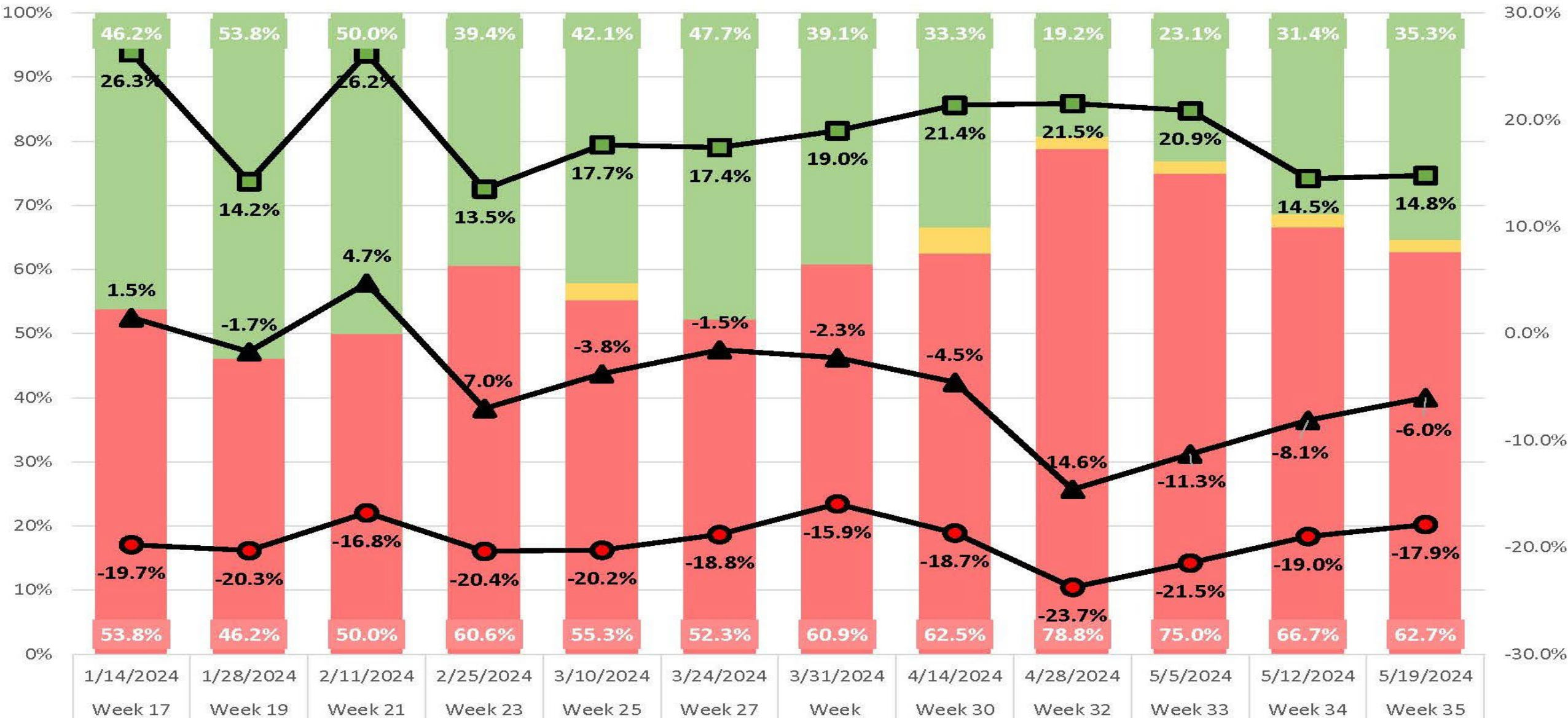
Admits				
Student Type	Fall 2023	Fall 2024	Change	% Change
Freshmen - Resident	989	1,043	54	5.5%
Freshmen - Nonresident	1,010	910	-100	-9.9%
Transfer - Resident	187	149	-38	-20.3%
Transfer - Nonresident	159	120	-39	-24.5%
Postbacs/Grads	102	123	21	20.6%
Total	2,447	2,345	-102	-4.2%

Confirmed				
Student Type	Fall 2023	Fall 2024	Change	% Change
Freshmen - Resident	426	409	-17	-4.0%
Freshmen - Nonresident	368	259	-109	-29.6%
Transfer - Resident	126	119	-7	-5.6%
Transfer - Nonresident	95	74	-21	-22.1%
Postbacs/Grads	102	123	21	20.6%
Total	1,117	984	-133	-11.9%

Enrolled				
Student Type	Fall 2023	Fall 2024	Change	% Change
Freshmen - Resident	4	1	-3	-75.0%
Freshmen - Nonresident	23	1	-22	-95.7%
Transfer - Resident	7	2	-5	-71.4%
Transfer - Nonresident	4	1	-3	-75.0%
Postbacs/Grads	26	35	9	34.6%
Total	64	40	-24	-37.5%



Public First-Year - Confirmed Students



■ % of Schools Down

■ % of Schools Up

● Avg. Year-to-Year Deposit Change: Down Schools

■ % of Schools Flat

▲ Avg. Year-to-Year Deposit Change: Overall

■ Avg. Year-to-Year Deposit Change: Up Schools

Spring 2024 Enrollment: Week 9

Student Headcounts Spring 2023 Week Ending 6/4/23 vs. Spring 2024 Week Ending 6/2/24 9 Weeks After Start of Term

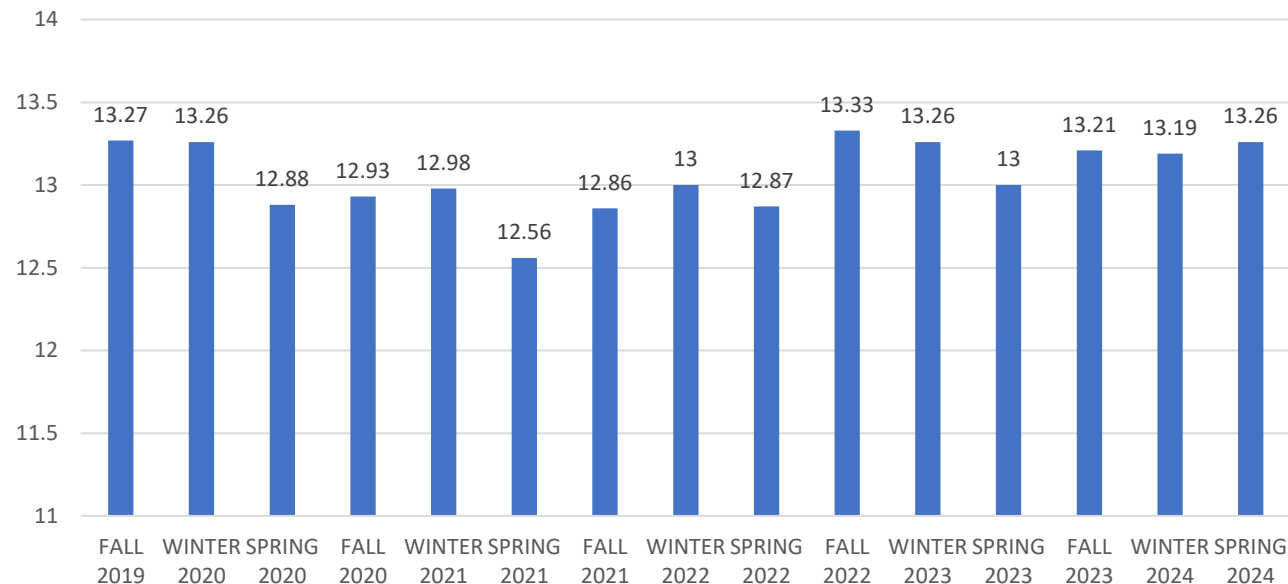
					Spring 2023		
	Spring 2023	Spring 2024	Change	% Change	End of Term	Change	% Change
New Freshmen	25	11	-14	-56.0%	32	-21	-65.6%
New Transfers	51	51	-	0.0%	64	-13	-20.3%
New PostBacs/Graduates	50	34	-16	-32.0%	52	-18	-34.6%
Subtotal - New Students	126	96	-30	-23.8%	148	-52	-35.1%
Continuing Undergraduate Students	2,462	2,420	-42	-1.7%	2,540	-120	-4.7%
Continuing Graduate Students	426	443	17	4.0%	429	14	3.3%
Returning Undergraduate Students	68	65	-3	-4.4%	64	1	1.6%
Returning Graduate Students	29	21	-8	-27.6%	38	-17	-44.7%
Non-Admitted Students	1,333	1,277	-56	-4.2%	2,288	-1,011	-44.2%
Grand Total - Headcount	4,444	4,322	-122	-2.7%	5,507	-1,185	-21.5%
Grand Total - FTE	2,915	2,799	-116	-4.0%	3,400	-601	-17.7%
Resident	3,289	3,220	-69	-2.1%	4,225	-1,005	-23.8%
Non-resident	1,155	1,102	-53	-4.6%	1,282	-180	-14.0%

SCH by Student Level Within Tuition Category Spring 2023 Week Ending 6/4/23 vs. Spring 2024 Week Ending 6/2/24 9 Weeks After Start of Term

Tuition Category	Spring 2023	Spring 2024	Change	% Change
UG WUE	7,476	7,005	-471	-6.3%
UG Resident	16,083	15,341	-742	-4.6%
UG Jack/Jo Pledge	377	384	7	1.9%
UG Non-resident	439	397	-42	-9.6%
UG Online	8,145	8,590	445	5.5%
Subtotal - Undergraduates	32,520	31,717	-803	-2.5%
GR Resident	393	369	-24	-6.1%
GR Non-resident	265	205	-60	-22.6%
GR AP MBA Online	858	930	72	8.4%
GR AP ED Online	570	615	45	7.9%
GR Online	156	174	18	11.5%
GR Education Differential	741	795	54	7.3%
Subtotal - Graduates	2,983	3,088	105	3.5%
Subtotal - Core Revenue SCH	35,503	34,805	-698	-2.0%
Staff Rates	326	252	-74	-22.7%
Waived Tuition	389	307	-82	-21.1%
Course Based Tuition	1,231	476	-755	-61.3%
Advanced Southern Credit	4,332	4,293	-39	-0.9%
Early Entry HS	79	25	-54	-68.4%
OLLI	819	825	6	0.7%
Subtotal - Supplemental Revenue SCH	7,176	6,178	-998	-13.9%
Grand Total - SCH	42,679	40,983	-1,696	-4.0%

Student Success & Retention

Average SCH by Term
Degree-Seeking Undergraduates



Freshman Cohort Retention:

Fall 22 : Fall 23 = 66.3% (370/558)

Fall 21 : Fall 22 = 65.6% (334/509)

Fall 23 : Winter 24 = 90.6% (577/637)

Fall 22 : Winter 23 = 91.9% (513/558)

Winter 24 : Spring 24 = 94.5% (545/577)

Winter 23 : Spring 23 = 91.4% (469/513)

Overall Undergraduate Retention:

Fall 22 : Fall 23 = 78.3% (2151/2747)

Fall 21 : Fall 22 = 76.2% (2291/3006)

Fall 23 : Winter 24 = 91.2% (2526/2771)

Fall 22 : Winter 23 = 91.7% (2520/2747)

Winter 24 : Spring 24 = 93.2% (2420/2597)

Winter 23 : Spring 23 = 92.9% (2422/2607)

Freshman Cohort 6-Year Graduation:

Fall 14 : Spring 20 = 45.6% (279/612)

Fall 15 : Spring 21 = 41.0% (317/774)

Fall 16 : Spring 22 = 46.5% (303/652)

Fall 17 : Spring 23 = 44.2% (319/721)

Degree Completions by Discipline Level Categories
Academic Year 2022-23 vs. Academic Year 2023-24
Applications and Awards - as of the end of May

Completions:
Through May,
2024

	Degree Applications			
	2022-23	2023-24	Change	% Change
Bachelor Degrees	700	687	-13	-1.9%
Resident: Entered as a First Year †	208	208	-	0.0%
Discipline Level 1	50	53	3	6.0%
Discipline Level 2	108	102	-6	-5.6%
Discipline Level 3	50	53	3	6.0%
Resident: Entered as a Transfer †	212	242	30	14.2%
Discipline Level 1	64	75	11	17.2%
Discipline Level 2	119	128	9	7.6%
Discipline Level 3	29	39	10	34.5%
Non-Resident (no state funding)	280	237	-43	-15.4%
Master Degrees	204	215	11	5.4%
Resident †	149	151	2	1.3%
Discipline Level 1	-	2	2	0.0%
Discipline Level 2	131	138	7	5.3%
Discipline Level 3	18	11	-7	-38.9%
Non-Resident (no state funding)	55	64	9	16.4%
Graduate Certificates/Licensures	94	648	554	589.4%
Resident †	58	430	372	641.4%
Discipline Level 1	6	33	27	450.0%
Discipline Level 2	43	381	338	786.0%
Discipline Level 3	9	16	7	77.8%
Non-Resident (no state funding)	36	218	182	505.6%
Totals	998	1,550	552	55.3%

	Degree Awards			
	2022-23	2023-24	Change	% Change
Bachelor Degrees	126	154	28	22.2%
Resident: Entered as a First Year †	35	34	-1	-2.9%
Discipline Level 1	7	7	0	0.0%
Discipline Level 2	15	19	4	26.7%
Discipline Level 3	13	8	-5	-38.5%
Resident: Entered as a Transfer †	37	65	28	75.7%
Discipline Level 1	11	24	13	118.2%
Discipline Level 2	19	31	12	63.2%
Discipline Level 3	7	10	3	42.9%
Non-Resident (no state funding)	54	55	1	1.9%
Master Degrees	65	68	3	4.6%
Resident †	43	44	1	2.3%
Discipline Level 1	-	1	1	0.0%
Discipline Level 2	41	40	-1	-2.4%
Discipline Level 3	2	3	1	50.0%
Non-Resident (no state funding)	22	24	2	9.1%
Graduate Certificates/Licensures	20	523	503	2515.0%
Resident †	13	349	336	2584.6%
Discipline Level 1	3	5	2	66.7%
Discipline Level 2	8	343	335	4187.5%
Discipline Level 3	2	1	-1	-50.0%
Non-Resident (no state funding)	7	174	167	2385.7%
Totals	211	745	534	253.1%

New Academic Programs

New Program Proposal for Existing Degrees

This form should be used to propose new minors or concentrations to existing degrees/majors. This form can also be used to convert a minor to a certificate as long as there are no changes to the existing curriculum. If proposing a new certificate in which new courses are being proposed, please use [New Program Proposal](#).

Once completed and signed, please upload the finished version to the [Curriculum & Catalog Submission link](#), which can also be found on the [SOU Provost Webpage](#).

New Program name: Certificate in Applied Statistics

CIP Code: (Classification of Instructional Program): 27.05

Impact statement:

1. What is the expected effect of this program on existing courses (both within your department/program or elsewhere in the SOU curriculum)?
No impact is expected. This proposal converts the existing minor into a certificate
2. Will any prerequisites or other course requirements affect other departments/programs? If so, the relevant chairs or program directors should be notified to determine if those departments/programs have sufficient capacity to meet these requirements. Please document your research into this possible impact.
Conversion to a certificate will not affect other programs.
3. Program Resource evaluation:
 - a. Faculty: Cite faculty availability or needs and impact on other teaching obligations. If additional faculty teaching hours are needed, how will that need be met?
No additional resources needed
 - b. Facilities: Cite any additional need for classrooms, equipment or laboratory space and how that need will be met.
None
 - c. Library: Are Hannon Library resources sufficient to meet the needs of this program? (Check with the library staff and **attach a copy of their report**.)
Click or tap here to enter text.
 - d. Other: Are any other resources needed to support this program? If so, please document them and explain how they will be obtained.
None
4. Catalog copy for the new program, including requirements and electives.

Requirements for the Applied Statistics Certificate:

Introductory Statistics Course:

- Stat 243Z – Elementary Statistics (4 credits)

Calculus Sequence:

- MTH 251 - Calculus I (4 credits)
- MTH 252 - Calculus II (4 credits)

Linear Algebra: (A new requirement)

- **MTH 261 – Linear Algebra (4 credits)**

Statistics Sequence: Choose both of the following.

- **MTH 361 - Statistical Methods I 4 credits**
- **MTH 461 - Statistical Methods II 4 credits each**

Choose one from the following: (A new requirement)

- **CS 256 (Computer Science I)**
- **CH 375 (Computational Methods for Scientists)**
- **MTH 343 – Applied Statistics (4 credits)**
- **An approve course.**

Electives (8-12 credits): Choose 2 (choose 3 if math majors) from the following. Up to one can be chosen in the lower division.

- **BA 282 – Applied Business Statistics (4 credits)**
- **PSY 225 and 225L – Methods, Statistics, and Applications (5 credits)**
- **SOAN 327 – Quantitative Data Analysis (4 credits)**
- **EC 332 - Quantitative Methods and Application (4 credits)**
- **MTH 343 – Applied Statistics (4 credits)**
- **CH 375 - Computational Methods for Scientists (4 credits)**
- **ES 349 and ES 349L – Maps, Cartography, and Geospatial Technology (5 credits)**
- **GEOG 349 and GEOG 349L – Maps, Cartography, and Geospatial Technology (5 credits)**
- **ES 386 – Environmental Data Analysis (4 credits)**
- **BA 420 – Applied Data Science (4 credits)**
- **OAL 425 – Research Methods in OAL (4 credits)**

5. Please provide written verification of contact with the Chair of any other departments or programs affected by the new program.
The certificate replaces our existing minor and has been reviewed by all impacted departments.

Approvals:

School Director Signature

Date

Updated 12/13/23

New Program Proposal Form

This program proposal form is intended to help you navigate the approval process for **a new graduate degree, major, or certificate** and to provide assistance in gathering evidence to establish alignment, demand, and viability of new programs. SOU carefully considers several factors in the review of new academic program proposals including, but not limited to: alignment with the institutional mission and strategic plan, market and student demand, competition, recruitment and retention factors, the points of the triangle, and resource need. All programs under consideration must answer the five questions as outlined in the SOU forward plan. Those five questions are:

- What resources will this new proposal require?
- What are the anticipated fiscal or performance benefits from this initiative?
- What is the time horizon for these expected benefits?
- What metrics and measurements will be used to monitor progress?
- What actions will be taken if the expected milestones are not achieved?

Deadline: October 27th, 2024 ([Why is this deadline so important?](#))

Once signed and completed, please upload the finished version to the [Curriculum & Catalog Submission link](#), which can also be found on the [SOU Provost Webpage](#).

Please complete the following:

School(s): BCEM

Program(s): Biochemistry Certificate

Program type (Bachelor, Master, Certificate, Minor, Concentration): Certificate

Degree Designation (BA, BS, BFA, MS, other): Certificate

Program Delivery (traditional/in-person, online, hybrid, other): traditional

When do you want the program to start: as soon as possible

A. Program Overview

- a. Provide a brief description of the program.

This will be a certificate in biochemistry. Students will learn the basics of chemistry and then get experience focused on synthesis and analysis of biomolecules.

- b. Will this program support or be supported by other programs?

It will be supported by all chemistry courses. Some of the chemistry courses have prerequisites of math or physics courses.

- c. Are there similar majors, certificates, minors, or credentials at SOU? How will this program impact those programs?

We currently have a biochemistry major, but this will be targeted at students who are not already chemistry majors. This will be a great certificate for premed students in biology and/or the biomedical sciences that are already taking most of these courses.

- d. What are the learning outcomes for the program?

The learning outcomes of this program are to acquire a basic understanding of chemistry, become comfortable with common organic and biochemistry vocabulary, and gain experience with synthesis, purification, and analysis of biomolecules.

B. Alignment with Institutional Mission and Goals:

- a. How does the proposed program support SOU's mission and strategic plan goals?

The university suggested the more groups of students we can target courses to the better. This not only will provide students with a tangible certificate showcasing their biochemistry experience, but it will encourage students to complete the entire biochemistry sequence, hopefully eliminating the low enrollment issues that we have been facing in recent years.

C. Points of the Triangle:

- a. Describe how this program supports one or more of the points of the triangle (supporting the liberal arts foundation, regional responsiveness, and/or creativity and innovation).

By adding this certificate, students in other majors on campus will be able to broaden their liberal arts education. There is always creativity in experimental design and the process of trouble shooting in the laboratory setting.

D. Demand: Working with SOU's Institutional Research, please provide answers to the following questions:

**Note: some certificates may be exempt from this section, please consult with your School Director for further guidance.*

- a. What is the current, five, and ten-year employment outlook for students graduating with this degree. Please provide both regional and national data.

Exempt according to school director.

- b. Please provide a comparator analysis that establishes a clear need for this program. Include a list of similar programs that exist regionally, statewide, and/or nationally and a summary of how the proposed program would complement similar programs at other institutions. Related to this, if a program would be in direct competition with another program, provide a rationale for why the demand would not be impacted by that program.

Exempt according to school director.

- c. Does the program serve a specific population or meet a specific need not captured through the data provided above?

Exempt according to school director.

- d. Will this program provide any opportunities to attract and retain students from underserved populations. Are there existing programs or resources that might help recruit these students?

Exempt according to school director.

E. Resource needs:

- a. Will new or additional faculty be needed to provide this program? Please explain how you arrived at the answer provided. If additional faculty teaching hours are needed, how will that need be met?

No, all of the courses listed are required by our majors and are already being taught on a regular basis by our current faculty. The new biochemical methods courses that have been proposed are replacing biochemistry labs we previously taught in our annual cycle of curriculum.

- b. Will new or additional administrative support be needed to provide this program?

No. The current level of support chemistry receives will be sufficient and all advising for this certificate can be done by faculty advisors.

- c. Will new or additional resources (facilities, equipment, etc.) be needed to provide this program? How will those needs be met?

No. The current resources have been sufficient to run these or the equivalent courses.

- d. Will new curriculum be needed to deliver this program?

No. The only new courses are replacing previous courses for our majors and will not add significantly to our department's offerings.

- e. Sufficient information resources are necessary to ensure the quality of new programs and to meet accreditation requirements. Contact your library faculty subject liaison to arrange a collection assessment demonstrating the level of current and/or needed information resource support for the proposed program. Attach a copy of the report with this proposal.

Holly Gabriel's report is included with the submitted materials.

F. Program Impact and Evaluation:

- a. Working with data provided by Institutional Research, provide benchmark estimates for the program success metrics below:

- i. What is the three and five year projection for major headcount and SCH for the program?

3-Year: 10 certificates (48 Credits x 10 Students = 480 SCH)

5-Year: 20 certificates (48 Credits x 20 Students = 960 SCH)

- ii. What is the three and five year projection for SCH to Faculty ELU ratio?

All of these courses are required for students in our chemistry majors so they will be populated by more than one group of students. The SCH to ELU ratio will not only be depended on students getting this certificate, but also how many other chemistry students are in the courses each year.

- iii. What is the three and five year projection for total number of degrees (grad degrees, majors, certificates) awarded?

3-Year: 10 certificates

5-Year: 20 certificates

- iv. What is the three and five year projection for course fill rate?

All of these courses are required for students in our chemistry majors so they will be populated by more than one group of students. The course fill rates will not only be

depended on students getting this certificate, but also how many other chemistry students are in the courses each year.


- b. Will any prerequisites or other course requirements affect other departments/programs? If so, the relevant chairs or program directors should be notified to determine if those departments/programs have sufficient capacity to meet these requirements. Please document your research into this possible impact.

Correspondence with Biology, Mathematics, and Environmental Science and Policy is included with the submitted materials. Physics is part of our department so they were included in all planning and discussions.

- c. Please provide written verification of contact with the Chair of any other departments or programs affected by the new program.

Correspondence with Biology, Mathematics, and Environmental Science and Policy is included with the submitted materials. Physics is part of our department so they were included in all planning and discussions.

Signatures

_____ Anna Oliveri Chair (printed name)	 _____ Signature	_____ 4/29/24 Date
_____ School Director (printed name)	_____ Signature	_____ Date

Once completed and signed, please upload the finished version to the [Curriculum & Catalog Submission link](#), which can also be found on the [SOU Provost Webpage](#).

Once you've completed this form and, having received approval from your Chair and School Director, the proposal will be routed through the following for steps for approval: Curriculum Committee, Faculty Senate, the SOU Board of Trustees, and the Higher Education Coordinating Commission (HECC). Please plan to have a representative available for all of the above meetings. The Provost's office will reach out to chairs to assist with the timing and scheduling of these meetings. If your proposal is approved at all of the SOU stages, you will need to fill out the [HECC New Program Proposal Form](#), which can also be found on the [SOU Provost Webpage](#).

Biochemistry Certificate (48 Credits)

- CH 221 General Chemistry I (3 Credits)
- CH 222 General Chemistry II (3 Credits)
- CH 223 General Chemistry III (3 Credits)
- CH 227 General Chemistry Laboratory I (2 Credits)
- CH 228 General Chemistry Laboratory II (2 Credits)
- CH 229 General Chemistry Laboratory III (2 Credits)
- CH 334 Organic Chemistry I (3 Credits)
- CH 335 Organic Chemistry II (3 Credits)
- CH 336 Organic Chemistry III (3 Credits)
- CH 337 Organic Chemistry Laboratory I (3 Credits)
- CH 339 Organic Chemistry Laboratory II (3 Credits)
- CH 341 Organic Chemistry Laboratory III (3 Credits)
- CH 451 Biochemistry I (3 Credits)
- CH 452 Biochemistry II (3 Credits)
- CH 453 Biochemistry III (3 Credits)
- CH 476 Biochemical Methods I (3 Credits)
- CH 477 Biochemical Methods II (3 Credits)

New Program Proposal Form

This program proposal form is intended to help you navigate the approval process for **a new graduate degree, major, or certificate** and to provide assistance in gathering evidence to establish alignment, demand, and viability of new programs. SOU carefully considers several factors in the review of new academic program proposals including, but not limited to: alignment with the institutional mission and strategic plan, market and student demand, competition, recruitment and retention factors, the points of the triangle, and resource need. All programs under consideration must answer the five questions as outlined in the SOU forward plan. Those five questions are:

- What resources will this new proposal require?
- What are the anticipated fiscal or performance benefits from this initiative?
- What is the time horizon for these expected benefits?
- What metrics and measurements will be used to monitor progress?
- What actions will be taken if the expected milestones are not achieved?

Deadline: October 27th, 2024 ([Why is this deadline so important?](#))

Once signed and completed, please upload the finished version to the [Curriculum & Catalog Submission link](#), which can also be found on the [SOU Provost Webpage](#).

Please complete the following:

School(s): BCEM

Program(s): Chemical Analysis Certificate

Program type (Bachelor, Master, Certificate, Minor, Concentration): Certificate

Degree Designation (BA, BS, BFA, MS, other): Certificate

Program Delivery (traditional/in-person, online, hybrid, other): traditional

When do you want the program to start: as soon as possible

A. Program Overview

- a. Provide a brief description of the program.

This will be a certificate in chemical analysis. Students will learn the basics of chemistry and then get experience focused on synthesis and analysis of chemical compounds.

- b. Will this program support or be supported by other programs?

It will be supported by all chemistry courses. Some of the chemistry courses have prerequisites of math or physics courses.

- c. Are there similar majors, certificates, minors, or credentials at SOU? How will this program impact those programs?

No, there is currently nothing that focuses only on chemical analysis. All of these courses are part of the chemistry major, but this is for students from other majors to highlight an additional skill.

- d. What are the learning outcomes for the program?

The learning outcomes of this program are to acquire a basic understanding of chemistry, become comfortable with common chemistry vocabulary, and gain experience with multiple chemical analysis techniques and instrumentation.

B. Alignment with Institutional Mission and Goals:

- a. How does the proposed program support SOU's mission and strategic plan goals?

The university suggested the more groups of students we can target courses to the better. This certificate opens our upper division labs up to students that are not part of the chemistry major. This not only will provide students with a certificate showcasing essential career skills, but it will allow another population of students into our courses, hopefully eliminating the low enrollment issues that we have been facing in recent years.

C. Points of the Triangle:

- a. Describe how this program supports one or more of the points of the triangle (supporting the liberal arts foundation, regional responsiveness, and/or creativity and innovation).

By adding this certificate, students in other majors on campus will be able to broaden their liberal arts education. A certificate in chemical analysis also touches upon regional responsiveness because this curriculum will prepare students in a variety of chemical analysis techniques that are currently used in industrial chemistry jobs in our community. There is always creativity in experimental design and the process of trouble shooting in the laboratory setting.

D. Demand: Working with SOU's Institutional Research, please provide answers to the following questions:

**Note: some certificates may be exempt from this section, please consult with your School Director for further guidance.*

- a. What is the current, five, and ten-year employment outlook for students graduating with this degree. Please provide both regional and national data.

Exempt according to school director.

- b. Please provide a comparator analysis that establishes a clear need for this program. Include a list of similar programs that exist regionally, statewide, and/or nationally and a summary of how the proposed program would complement similar programs at other institutions. Related to this, if a program would be in direct competition with another program, provide a rationale for why the demand would not be impacted by that program.

Exempt according to school director.

- c. Does the program serve a specific population or meet a specific need not captured through the data provided above?

Exempt according to school director.

- d. Will this program provide any opportunities to attract and retain students from underserved populations. Are there existing programs or resources that might help recruit these students?

Exempt according to school director.

E. Resource needs:

- a. Will new or additional faculty be needed to provide this program? Please explain how you arrived at the answer provided. If additional faculty teaching hours are needed, how will that need be met?

No, all of the courses listed are required by our majors and are already being taught on a regular basis by our current faculty. The new courses that have been proposed are replacing labs we previously taught in our annual cycle of curriculum.

- b. Will new or additional administrative support be needed to provide this program?

No. The current level of support chemistry receives will be sufficient and all advising for this certificate can be done by faculty advisors.

- c. Will new or additional resources (facilities, equipment, etc.) be needed to provide this program? How will those needs be met?

No. The current resources have been sufficient to run these or the equivalent courses.

- d. Will new curriculum be needed to deliver this program?

No. The only new courses are replacing previous courses for our majors and will not add significantly to our department's offerings.

- e. Sufficient information resources are necessary to ensure the quality of new programs and to meet accreditation requirements. Contact your library faculty subject liaison to arrange a collection assessment demonstrating the level of current and/or needed information resource support for the proposed program. Attach a copy of the report with this proposal.

Holly Gabriel's report is included with the submitted materials.

F. Program Impact and Evaluation:

- a. Working with data provided by Institutional Research, provide benchmark estimates for the program success metrics below:

- i. What is the three and five year projection for major headcount and SCH for the program?

3-Year: 5 certificates (48 Credits x 5 Students = 240 SCH)

5-Year: 15 certificates (48 Credits x 15 Students = 720 SCH)

- ii. What is the three and five year projection for SCH to Faculty ELU ratio?

All of these courses are required for students in our chemistry majors so they will be populated by more than one group of students. The SCH to ELU ratio will not only be depended on students getting this certificate, but also how many other chemistry students are in the courses each year.

- iii. What is the three and five year projection for total number of degrees (grad degrees, majors, certificates) awarded?

3-Year: 5 certificates

5-Year: 15 certificates

- iv. What is the three and five year projection for course fill rate?

All of these courses are required for students in our chemistry majors so they will be populated by more than one group of students. The course fill rates will not only be depended on students getting this certificate, but also how many other chemistry students are in the courses each year.


- b. Will any prerequisites or other course requirements affect other departments/programs? If so, the relevant chairs or program directors should be notified to determine if those departments/programs have sufficient capacity to meet these requirements. Please document your research into this possible impact.

Correspondence with Biology, Mathematics, and Environmental Science and Policy is included with the submitted materials. Physics is part of our department so they were included in all planning and discussions.

- c. Please provide written verification of contact with the Chair of any other departments or programs affected by the new program.

Correspondence with Biology, Mathematics, and Environmental Science and Policy is included with the submitted materials. Physics is part of our department so they were included in all planning and discussions.

Signatures

Anna Oliveri		4/29/24
Chair (printed name)	Signature	Date
School Director (printed name)	Signature	Date

Once completed and signed, please upload the finished version to the [Curriculum & Catalog Submission link](#), which can also be found on the [SOU Provost Webpage](#).

Once you've completed this form and, having received approval from your Chair and School Director, the proposal will be routed through the following for steps for approval: Curriculum Committee, Faculty Senate, the SOU Board of Trustees, and the Higher Education Coordinating Commission (HECC). Please plan to have a representative available for all of the above meetings. The Provost's office will reach out to chairs to assist with the timing and scheduling of these meetings. If your proposal is approved at all of the SOU stages, you will need to fill out the [HECC New Program Proposal Form](#), which can also be found on the [SOU Provost Webpage](#).

Chemical Analysis Certificate (48 Credits)

- CH 221 General Chemistry I (3 Credits)
- CH 222 General Chemistry II (3 Credits)
- CH 223 General Chemistry III (3 Credits)
- CH 227 General Chemistry Laboratory I (2 Credits)
- CH 228 General Chemistry Laboratory II (2 Credits)
- CH 229 General Chemistry Laboratory III (2 Credits)
- CH 334 Organic Chemistry I (3 Credits)
- CH 335 Organic Chemistry II (3 Credits)
- CH 336 Organic Chemistry III (3 Credits)
- CH 337 Organic Chemistry Laboratory I (3 Credits)
- CH 339 Organic Chemistry Laboratory II (3 Credits)
- CH 341 Organic Chemistry Laboratory III (3 Credits)
- CH 421 Analytical Chemistry (3 Credits)
- CH 425 Instrumental Analysis (3 Credits)
- 9 Credits (approved by advisor) from these Advanced Chemistry Lab Electives
 - CH 376 Electrochemistry (3 Credits)
 - CH 377 Molecular Spectroscopy (3 Credits)
 - CH 378 Chromatography (3 Credits)
 - CH 473 Advanced NMR Spectroscopy (3 Credits)
 - CH 474 Advanced Chemical Techniques (3 Credits)
 - CH 475 Mass Spectrometry (3 Credits)

New Program Proposal for Existing Degrees

This form should be used to propose new minors or concentrations to existing degrees/majors. This form can also be used to convert a minor to a certificate as long as there are no changes to the existing curriculum. If proposing a new certificate in which new courses are being proposed, please use [New Program Proposal](#).

Once completed and signed, please upload the finished version to the [Curriculum & Catalog Submission link](#), which can also be found on the [SOU Provost Webpage](#).

New Program name: Certificate in Chemistry

CIP Code: (Classification of Instructional Program): 40.0501

Impact statement:

1. What is the expected effect of this program on existing courses (both within your department/program or elsewhere in the SOU curriculum)?
The certificate in chemistry will replace the minor in chemistry as the primary means by which a student can identify chemistry as an area of study outside of their major. Little to no impact is expected on courses at SOU.
2. Will any prerequisites or other course requirements affect other departments/programs? If so, the relevant chairs or program directors should be notified to determine if those departments/programs have sufficient capacity to meet these requirements. Please document your research into this possible impact. No affect to other departments or programs.
3. Program Resource evaluation:
 - a. **Faculty:** Cite faculty availability or needs and impact on other teaching obligations. If additional faculty teaching hours are needed, how will that need be met?
No additional resources needed.
 - b. **Facilities:** Cite any additional need for classrooms, equipment or laboratory space and how that need will be met.
NONE
 - c. **Library:** Are Hannon Library resources sufficient to meet the needs of this program? (Check with the library staff and ***attach a copy of their report.***)
Holly Gabriel was contacted on 4/24/24
 - d. **Other:** Are any other resources needed to support this program? If so, please document them and explain how they will be obtained.
NONE
4. Catalog copy for the new program, including requirements and electives.
Chemistry Certificate
CH 221 General Chemistry I (3 Credits)
CH 222 General Chemistry II (3 Credits)
CH 223 General Chemistry III (3 Credits)

CH 227 General Chemistry Laboratory I (2 Credits)

CH 228 General Chemistry Laboratory II (2 Credits)

CH 229 General Chemistry Laboratory III (2 Credits)

13 Credits (approved by advisor) of Upper division electives from at least **two** of the following areas of chemistry: analytical, biochemistry, inorganic, organic, and physical.

5. Please provide written verification of contact with the Chair of any other departments or programs affected by the new program.
6. The certificate replaces our existing minor and has been reviewed by all impacted departments.

Approvals:

School Director Signature

Date

Updated 12/13/23

New Program Proposal for Existing Degrees

This form should be used to propose new minors or concentrations to existing degrees/majors. This form can also be used to convert a minor to a certificate as long as there are no changes to the existing curriculum. If proposing a new certificate in which new courses are being proposed, please use [New Program Proposal](#).

Once completed and signed, please upload the finished version to the [Curriculum & Catalog Submission link](#), which can also be found on the [SOU Provost Webpage](#).

New Program name: Certificate in Mathematics

CIP Code: (Classification of Instructional Program): 27.01

Impact statement:

1. What is the expected effect of this program on existing courses (both within your department/program or elsewhere in the SOU curriculum)?
No impact is expected. This proposal converts the existing minor into a certificate.
2. Will any prerequisites or other course requirements affect other departments/programs? If so, the relevant chairs or program directors should be notified to determine if those departments/programs have sufficient capacity to meet these requirements. Please document your research into this possible impact. Conversion to a certificate will not affect other programs.
3. Program Resource evaluation:
 - a. **Faculty:** Cite faculty availability or needs and impact on other teaching obligations. If additional faculty teaching hours are needed, how will that need be met?
No additional resources needed.
 - b. **Facilities:** Cite any additional need for classrooms, equipment or laboratory space and how that need will be met.
None
 - c. **Library:** Are Hannon Library resources sufficient to meet the needs of this program? (Check with the library staff and ***attach a copy of their report.***)
[Click or tap here to enter text.](#)
 - d. **Other:** Are any other resources needed to support this program? If so, please document them and explain how they will be obtained.
None
4. Catalog copy for the new program, including requirements and electives.

Students must meet all applicable requirements listed in the Minors section of this catalog, including the Minor residence requirement.

Requirements (26-28 credits) (30-32 credits) ,

- MTH 251 – Calculus I (4 credits)
- MTH 252 – Calculus II (4 credits)

- MTH 253 – Calculus III (4 credits)
- MTH 261 – Linear Algebra (4 credits)
- MTH 290 – Mathematical Perspectives (2 credits)

Three additional mathematics electives (12 – 14 credits) . Choose from:

- MTH 281 – Calculus IV (4 credits)
- MTH 311 – Number Structures (5 credits)
- MTH 321 – Differential Equations (4 credits)
- MTH 331 – Introduction to Real Analysis (4 credits)
- MTH 341 – Introduction to Algebraic Systems (4 credits)
- MTH 343 – Applied Statistics (4 credits)
- MTH 346 – Linear Algebra II (4 credits)
- MTH 361 – Statistical Methods I (4 credits)
- MTH 421 – Topics in Applied Mathematics (4 credits)
- MTH 461 – Statistical Methods II (4 credits)

No requirement may be met with a grade below C-.

Consult your advisor to select upper division mathematics courses that are most applicable to your major and/or career goals. Some upper division courses will have additional prerequisites.

The upper division credits are usually fulfilled with three 4-5 credit classes. Students may substitute two distinct MTH 481 topics for one of those courses. Double minors in both Mathematics and Mathematics Education may still count two of the MTH 481 topics taken for the Mathematics Education Minor for one course of the upper division requirements in the Mathematics Minor.

5. Please provide written verification of contact with the Chair of any other departments or programs affected by the new program.
The certificate replaces our existing minor and has been reviewed by all impacted departments.

Approvals:

School Director Signature

Date

Updated 12/13/23

New Program Proposal for Existing Degrees

This form should be used to propose new minors or concentrations to existing degrees/majors. This form can also be used to convert a minor to a certificate as long as there are no changes to the existing curriculum. If proposing a new certificate in which new courses are being proposed, please use [New Program Proposal](#).

Once completed and signed, please upload the finished version to the [Curriculum & Catalog Submission link](#), which can also be found on the [SOU Provost Webpage](#).

New Program name: Certificate in Mathematics Education

CIP Code: (Classification of Instructional Program): 27.01

Impact statement:

1. What is the expected effect of this program on existing courses (both within your department/program or elsewhere in the SOU curriculum)?
No impact is expected. This proposal converts the existing minor into a certificate.
2. Will any prerequisites or other course requirements affect other departments/programs? If so, the relevant chairs or program directors should be notified to determine if those departments/programs have sufficient capacity to meet these requirements. Please document your research into this possible impact. Conversion to a certificate will not affect other programs.
3. Program Resource evaluation:
 - a. **Faculty:** Cite faculty availability or needs and impact on other teaching obligations. If additional faculty teaching hours are needed, how will that need be met?
No additional resources needed.
 - b. **Facilities:** Cite any additional need for classrooms, equipment or laboratory space and how that need will be met.
None
 - c. **Library:** Are Hannon Library resources sufficient to meet the needs of this program? (Check with the library staff and ***attach a copy of their report.***)
Click or tap here to enter text.
 - d. **Other:** Are any other resources needed to support this program? If so, please document them and explain how they will be obtained.
None
4. Catalog copy for the new program, including requirements and electives.

Requirements of the Mathematics Education Certificate:

Lower Division Courses (12 credits)

Fundamentals of Elementary Mathematics I, II, and III (MTH 211, 212, and 213)

NOTE: Math majors who successfully apply for and complete a 4 credit MTH 409 Practicum, assisting an instructor in one of MTH 211, 212, or 213, automatically meet

the lower-division requirements. (They substitute MTH 409 plus two of MTH 251, 252, 253, 261, and 281 for the 12-credit lower division requirement.)

Upper Division Courses (15 credits)

Five distinct topics in Middle School and High School Mathematics (MTH 481)

NOTE: Students may apply for and complete up to two elementary, middle, or high school 3-credit MTH 409 practicums as a substitute for up to two of the MTH 481 courses.

Prospective Elementary and Middle School Mathematics Teachers: Students who complete the Mathematics Education Minor also meet the course prerequisites for the Foundational Mathematics Endorsement in the MAT program. (To satisfy prerequisites, all course grades should be C– or better.)

5. Please provide written verification of contact with the Chair of any other departments or programs affected by the new program.
The certificate replaces our existing minor and has been reviewed by all impacted departments.

Approvals:

School Director Signature

Date

Updated 12/13/23

New Program Proposal

NOTE: This form should be used for new certificates, new minors, or new concentrations to existing degrees. For new majors/degrees, complete the HECC new program proposal form as well as this form.

New Program name: Single Subject Secondary Teaching Certificate

CIP Code: (Classification of Instructional Program): 13.1205

Impact statement:

1. What is the expected effect of this program on existing courses (both within your department/program or elsewhere in the SOU curriculum)?

We are anticipating that only a few students within our cross campus partner majors will be “ready” and interested in this accelerated program. It is a less expensive route, but on the flipside of the coin, the master's degree (MAT) moves candidates higher on the salary schedule once hired. For some, they may be able to finish in less time, however, it may still take five years for others which is equivalent to the BS/BA degree plus the MAT. We do expect this is build some excitement within the P-12 Educational Community at large as we have heard from many that there are potential teachers who are hesitant to move forward because of the time and cost of the graduate degree; so we are putting forward this alternative pathway. There is plenty of room in our cohorts for this program which will combine undergrad and grad students in the same courses with slightly different expectations.

2. Will any prerequisites or other course requirements affect other departments/programs? If so, the relevant chairs or program directors should be notified to determine if those departments/programs have sufficient capacity to meet these requirements. Please document your research into this possible impact.

We have been working with other department and university leaders for the past two years. It was determined that creating a significant “stand alone” Teaching Certificate was a better avenue than creating multiple new majors. Recognizing the importance of advising, we have created digital advising sheets that can be used by the advisor in the four programs closely tied to this proposal.

[English](#)

[Health/PE](#)

[Spanish](#)

[Math](#)

These tools can be used as templates when and if leaders from other majors across campus that traditionally feed into the MAT program want to provide a similar undergraduate pathway.

3. Program Resource evaluation:

- a. **Faculty:** Cite faculty availability or needs and impact on other teaching obligations. If additional faculty teaching hours are needed, how will that need be met?

We do not anticipate the need for additional faculty at this time as we anticipate these undergraduate students would fold into our existing MAT courses and there is plenty of room. We do have a rich group of adjunct faculty within the southern Oregon region, and we have learned to partner with these adjunct instructors to maintain consistency if we need to add additional sections.

- b. **Facilities:** Cite any additional need for classrooms, equipment or laboratory space and how that need will be met.

We do not anticipate the need for additional classrooms or equipment at this time as we anticipate these undergraduate students would fold into our existing MAT courses and there is plenty of room.

- c. **Library:** Are Hannon Library resources sufficient to meet the needs of this program? (Check with the library staff and [**attach a copy of their report.**](#))

We do not anticipate the need for additional library services at this time as we anticipate these undergraduate students would fold into our existing MAT courses and there is plenty of room.

- d. **Other:** Are any other resources needed to support this program? If so, please document them and explain how they will be obtained.

Advising will be the most important aspect of this program option. Education coordinators will need to work closely with advisors in the major to make sure candidates are taking the correct courses to be ready to apply in their junior year.

4. Catalog copy for the new program, including requirements and electives.

Students working toward a BS or BA degree in their major with the goal of becoming a secondary teacher in Oregon will have the opportunity to apply for an accelerated program allowing them to earn the Single Subject Secondary Teaching Certificate. By completing all of the requirements for this certificate

and additional test and field placements (student teaching), candidates will be recommended to the state (TSPC) for a secondary teaching license in their content area.

5. Please provide written verification of contact with the Chair of any other departments or programs affected by the new program.

This proposal has been approved at the MAT Committee and the full Education Department level. Cross Campus departments that will be affected by this program either now or the future have been notified during our TEC Committee meetings in 2023-24.

10/10/23

New Program Proposal

NOTE: This form should be used for new certificates, new minors, or new concentrations to existing degrees. For new majors/degrees, complete the HECC new program proposal form as well as this form.

New Program name: Special Education “Added Endorsement” Certificate

CIP Code: (Classification of Instructional Program): 13.1001

Impact statement:

1. What is the expected effect of this program on existing courses (both within your department/program or elsewhere in the SOU curriculum)?
 - *Our expectation is that this opportunity for the added endorsement in SPED will build excitement throughout southern Oregon. Our students have shared in recent years that they would like the opportunity to complete the SPED endorsement as undergrads. Our K-12 partners are encouraging us to find ways to produce more qualified SPED teachers without the expense of a graduate degree. The Education Department is wide open to growth within our SPED program. Because of the lack of candidates, the SPED graduate program had to be put on hold for the 23-24 academic year.*
 - *The added endorsement option has been in place for several years using the graduate-level courses. We will continue to offer candidates the option to add the SPED endorsement at the graduate level as this may move them higher on the salary schedule in their district.*
 - *The initial licensure SPED program as part of the MAT will also remain in place. These 400-level courses will be held in a split level format until such a time as there are enough students to warrant unique sections.*

2. Will any prerequisites or other course requirements affect other departments/programs? If so, the relevant chairs or program directors should be notified to determine if those departments/programs have sufficient capacity to meet these requirements. Please document your research into this possible impact.
 - There will be no impact on other departments or programs. The requirements for this certificate are all housed within the Education Department. They will be split level courses already approved and offered through the SPED program.*

3. Program Resource evaluation:
 - ◆ **Faculty:** Cite faculty availability or needs and impact on other teaching obligations. If additional faculty teaching hours are needed, how will that need be met?

A new SPED faculty member has been hired to join Education in Fall 2024. Somer Matthews will work closely with Education Leadership to establish this additional pathway for future SPED educators. Education has a strong partnership with many southern Oregon SPED professionals who teach as part of our adjunct pool. Because these courses will be cross-listed with Graduate SPED courses, there will be no need for additional faculty.

- ◆ **Facilities:** Cite any additional need for classrooms, equipment or laboratory space and how that need will be met.
Because these courses will be cross-listed with Graduate SPED courses, there will be no need for additional facility support.
- ◆ **Library:** Are Hannon Library resources sufficient to meet the needs of this program? (Check with the library staff and **attach [a copy of their report.](#)**)
Because these courses will be cross-listed with Graduate SPED courses, there will be no need for additional library resources.
- ◆ **Other:** Are any other resources needed to support this program? If so, please document them and explain how they will be obtained.
Because these courses will be cross-listed with Graduate SPED courses, there will be no need for additional resources other than intentional advising within the Education Studies degree.

4. Catalog copy for the new program, including requirements and electives.

The certificate program equips students with the skills necessary to obtain a Special Education Endorsement qualifying them to teach in a special education classroom. To pursue this certificate, students must hold, or be eligible to hold, an Oregon teaching license. To be awarded this certificate, students must complete the course requirements listed below. The program requires the completion of 32 credits. Added endorsement may be earned separately or in conjunction with a teacher preparation program leading to an Oregon license. All courses taken for the certificate must be completed with a grade of B- or better.

(Note: These course numbers are yet to be assigned)

[SPED 420b Law and Policy](#)

[SPED 428b Characteristics and Eligibility of Exceptionalities](#)

[SPED 422b Adminis. & Interpret. of Assessment Instruments](#)

[SPED 426b IEP Development and Transition Planning](#)

[SPED 424b Interventions in Acad. Skills - Math Methods](#)

[SPED 423b Behavior Management](#)

[SPED 429b Interventions in Acad. Skills – Reading Methods](#)

[SPED 411 Internship](#)

5. Please provide written verification of contact with the Chair of any other departments or programs affected by the new program.

This proposal has been approved at the Education Studies Committee and the full Education Department level. No other departments are affected by this program.

10/10/23

**Southern Oregon University
Board of Trustees
Academic and Student Affairs Committee**

**RESOLUTION
New Bachelor's Degree and Certificate Programs**

Whereas, the Southern Oregon University benefits from a cross-section of high-quality, well-designed curricular programs;

Whereas, the university wishes to offer the following degree and certificate programs:

1. Certificate, Applied Statistics;
2. Certificate, Biochemistry;
3. Certificate, Chemical Analysis;
4. Certificate, Chemistry;
5. Certificate, Mathematics;
6. Certificate, Mathematics Education;
7. Certificate, Single Subject Secondary Teaching; and
8. Certificate, Special Education, Added Endorsement;

Whereas, these proposed programs leverage existing institutional strengths and create expanded opportunities for undergraduate students;

Whereas, these programs have been approved by the relevant institutional units and committees, and the SOU Faculty Senate; and

Whereas, the Academic and Student Affairs Committee is authorized by the Board of Trustees to approve new programs on behalf of the Board. Now, therefore,

Be it resolved, the Academic and Student Affairs Committee of the Board of Trustees of the Southern Oregon University hereby approves the aforementioned new certificate programs, as provided in the Committee's June 20, 2024 documentation.

VOTE:

DATE: June 20, 2024

Strategic Enrollment Council Update



Summer Goals: Build on 2023-24 Strategic Enrollment Management Plan



Student Success and Retention 2024-24 Goals



- Strategies from withdraw survey, especially around mental health
- Continue to support Navigate - moving progress reports to be much more streamlined Financial literacy push
- Increase student retention for on campus housing students
- Re-engage Student Affairs staff in ongoing training on key items such as student development and mental health triage
- 5 Stages of Belonging
- Registration Holds Review and Improvement

Recruitment & Marketing Committee

2023-24 Areas of Focus

- Promotion of Adult Learning, Micro-credentials, Certificates
- Branding Discussion, campus wide
- UX/SEO Website Audit (landing page and academic pages)
- Pre-college youth programs matriculation
- Expansion of K-12 Data Share Partnerships
- Improve Confirm to Enroll yield for new students
- Raider Ready Onboarding
- Marketing and Recruitment Budget and Staffing increase discussion
- Expand Transfer Partnerships

Financial Aid

- Curating financial literacy content to provide to students. Develop a communication plan with the subcommittee including topic selection and methods.
- Develop a campus wide survey to understand the accessibility and needs of our students with financial aid to improve processes.
- Formation of a FAFSA filing campaign to increase early filing rates.
- Review policy and procedures for processes that stifle student financial aid access as well as broadening awareness of distinguished characteristics between foundation and institutional funding.
- Develop a financial aid forecasting model.

Academic Program Planning



- Advise on proposed changes to the New Program Proposal Form/Process
- Advise on the development of program lifecycle metrics
- Work with IR to develop processes and procedures for the implementation and use of Lightcast

2023-24 Big Wins

- Financial Aid Committee
 - Review of student balances
 - Single fee concept
 - Scholarship matrix
- Recruitment & Marketing Committee
 - Website audit
 - Spanish parallel of SOU.edu website
 - Upload of certificates onto website to increase visibility
- Student Success & Retention
 - Evaluation of survey data
 - Identifying reasons for attrition: mental health and finances
- Academic Program Planning Committee
 - Incorporation of Lightcast data to program evaluation
 - Career paths available on SOU.edu

Summer Goals: Build on 2023-24 Strategic Enrollment Management Plan



Core Information System Replacement Project Update

Workday Update

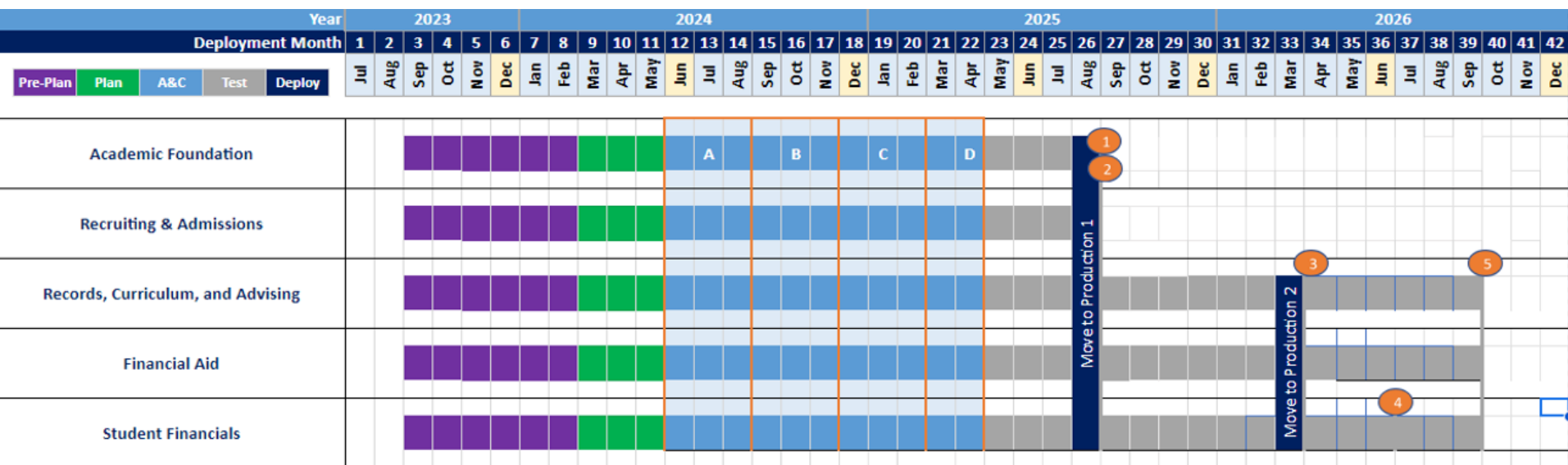


- Continuing to work out the kinks
- Offering more direct contacts for assistance
- Updating website
- Creating more guides and how -to videos

WorkdayStudent



- Bigger and longer than first phase
- Extensive integration
 - Admissions
 - Catalog
 - Schedule
 - Financial aid
 - Student financials
 - Advising
 - Student records
- Early, continuous testing
- Faculty and student advisory groups



Move to Production 1		Move to Production 2			Customer Uptake 4	Customer Uptake 5
Customer Uptake 1	Customer Uptake 2	Customer Uptake 3				
Recruiting & Admissions Application Fees & Tuition Deposits Academic Units & Levels Student Core Program of Study Profiles Calendars and Educational Institutions	Verifications, Awarding & Packaging for New Students ISIRs Course Catalog	Registration & Advising Student Conversion (All) Verifications, Awarding & Packaging for Continuing Students Fee Calculations, Sponsors, & Waivers Class Schedule Historical Conversion		Payments Cashiering Integration Payment Plans	Student Financials Balances Disbursement & R2T4 Grading Graduation Transcript Generation End-of-term Processing	

Move to Production (MTP): when configuration is moved to the Production Tenant

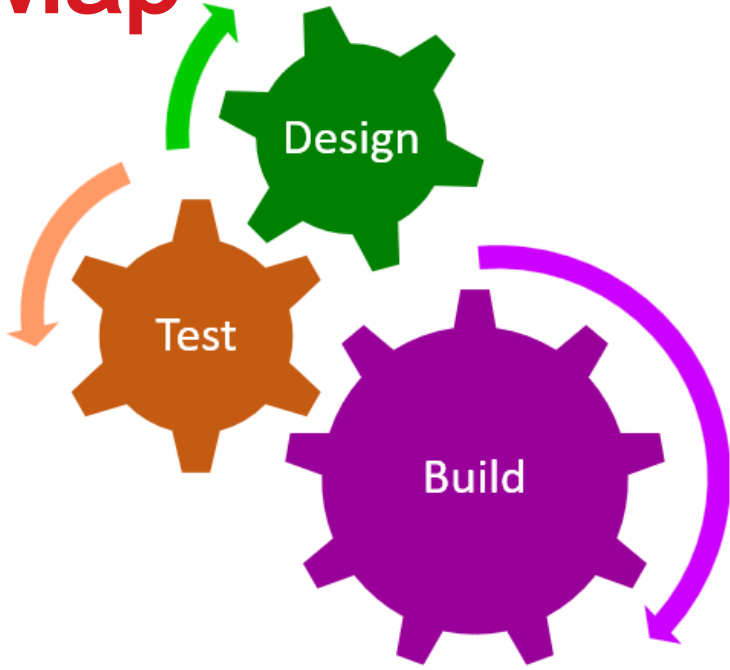
Customer Uptake Milestone: when the institution starts using the feature and is transacting in Workday

Project Map



Fall 2023 – Spring 2024

- Academic Foundations
- Admissions
- Records, Curriculum, & Advising
- Financial Aid
- Student Financials



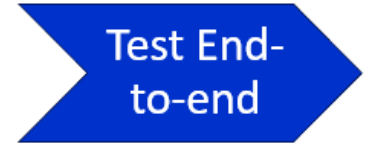
Summer 2024 – Winter 2025

- Tenant #1 — June-August 2024
- Tenant #2 — September-November 2024
- Tenant #3 — December 2024-February 2025
- Tenant #4 — March-April 2025



Fall 2025 – Winter 2026

- Academic Foundations & Admissions — September 2025
- Records, Curriculum, Advising, Financial Aid & Student Financials — March 2026



Spring 2026 – Fall 2026

- Records, Curriculum, Advising, Financial Aid & Student Financials — September 2026

Free Application for Federal Student Aid Update

FAFSA Update

SOU Board of Trustees

Academic & Student Affairs Committee

June 20th, 2024

Karinda Decker, Director of Financial Aid

Dr. Matt Stillman, AVP for Enrol. Mgmt. & University Registrar



Overview

Department of Education (DOE) has made significant changes to the FAFSA

Several technical & procedural hiccups with DOE's implementation, multiple timing setbacks, calculation errors, etc. (see appendix for details)

Additional substantive issues at the state level as well

Update on how SOU has approached the situation, where we're at in the process, and potential ramifications/benefits



SOU's Proactive Approach

Communication, communication, and more communication to both current and prospective students, and SOU stakeholders

FAFSA workshops and individual FAFSA assistance


Provided prospective students with a net price calculator tool

Strong collaboration between Financial Aid, Admissions, IT, and Marketing

Lots of proactive technical work

External help from NAFSA

Adjusted multiple deadlines



Where are we at?

We have been packaging students since April 1st and have remained caught up

Students are notified immediately upon packaging & directly tied communication with Admissions for prospective students

Data as of June 5th:

We're completely caught up on FAFSA processing!

2803 financial aid offers have been sent

233 rejected FAFSAs (down from 655 from last Board mtg.)

Most Foundation Scholarships have been awarded and students notified

Oregon Opportunity Grant (OOG) have been awarded and students notified

Need-based SOU scholarships for new students have been awarded and students notified

Where are
we heading /
what's left?

Continue to add foundation scholarships as departments make decisions

Current students with renewable scholarships will be added to files this Summer once Spring grades have rolled.

OSAC Scholarship announcements usually come towards end of Summer

Continue to following up with rejected FAFSAs

All appeals to FAFSA information are on hold until ED allows for school corrections to be done to the FAFSA



Potential Benefits & Concerns

Potential Benefits:

FAFSA is much simpler now – that will benefit us long-term

PELL eligibility has increased – we'll have many more PELL-eligible students now

SOU is ahead of many competitors in terms of technical preparation & proactivity

Potential Concerns:

On a national level, we'll likely see a negative “blip” with enrollments next year

More students will delay decision-making and possibly take a gap year

SOU is ahead on timing, but many competitors are not, and students shop

Have we seen the end of the technical issues from DOE?

Growing concern about another potential major delay next year

PELL eligibility increased, but award amounts have not

State-level aid is a major ongoing concern



FAFSA Key Dates

In a normal processing year, the FAFSA is released on October 1. Students complete the FAFSA, the FAFSA is processed, and ISIRs are generated within 3-5 business days and sent to institutions. Applicants and institutions are typically able to make corrections to the FAFSA immediately after it is processed. Below is a timeline of the 2024-25 cycle.



KEY Red = Late announcement or release | Blue = NASFAA action/communication
Orange = Department of Education error



SAI Formula/Student Eligibility Determination Key Dates

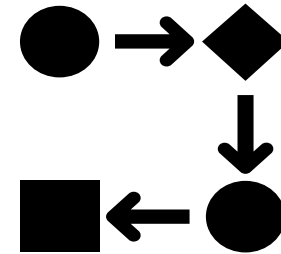
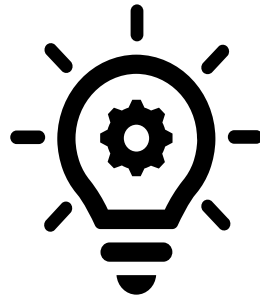
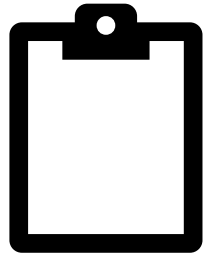
Formerly known as the EFC, the formula that determines a student's aid eligibility is typically updated annually and finalized prior to the release of the FAFSA on October 1. In a normal processing year, ISIRs contain accurate SAIs upon which financial aid administrators can make financial aid offers to students. Below is a timeline of the 2024-25 cycle.

- December 27, 2020:** Consolidated Appropriations Act, 2021 signed into law; includes FAFSA Simplification Act
- March 15, 2021:** Consolidated Appropriations Act, 2022 includes technical revisions to FAFSA Simplification Act including delaying implementation for FAFSA and SAI formula provisions to 2024-25
- November 21, 2022:** ED publishes 2024-25 Draft Student Aid Index (SAI) and Pell Grant Eligibility Guide; tables reflect original figures from FAFSA Simplification Act
- May 19, 2023:** ED releases first update of Draft Student Aid Index (SAI) and Pell Grant Eligibility Guide; tables still reflect original figures from FAFSA Simplification Act
- August 25, 2023:** ED issues second update to Draft Student Aid Index (SAI) and Pell Grant Eligibility Guide; tables still reflect original figures from FAFSA Simplification Act
- September 13, 2023:** A participant asks ED in a FAFSA webinar whether tables in the SAI formula will be updated for inflation; ED indicates no plans to do so for 2024-25 but will update in 2025-26
- September 21, 2023:** ED releases FSA Estimator
- September 25, 2023:** FSA Estimator taken down due to inaccurate SAI/Pell information being generated
- October 16, 2023:** NASFAA requests that ED update SAI formula tables for inflation
- January 23, 2024:** White House announces SAI formula tables will be updated; no details on when tables will be updated or whether it will impact ISIR delivery promised for late January
- January 30, 2024:** Final SAI Guide with formula tables updated for inflation published
- February 27, 2024:** ED announces it is making a significant change to the SAI formula to permit the Student Contribution from Income (SCI) to be as low as -\$11,130 vs. -\$1,500 from earlier versions of the SAI formula
- February 28, 2024:** ED is alerted to an issue with SAIs being incorrectly calculated due to dependent student assets being ignored
- March 1, 2024:** President Biden signs continuing resolution legislation, amending the FAFSA Simplification Act to place a -\$1500 floor on the SCI for 2024-25 and \$0 floor for 2025-26 and beyond to address earlier ED error
- March 12, 2024:** ED announces error in estimated SAIs provided to students from households with 2 income earners where one income is < \$60K causing assets not to be considered in the SAI
- March 21, 2024:** ED notified by a financial aid administrator that the IRS FA-DDX appears to be transferring the wrong line item from the tax return for US taxes paid, using a higher figure that includes self-employment tax (meaning SAIs are appearing to be lower than they should be)
- March 22, 2024:** ED announces error in SAIs being delivered to schools on ISIRs where student assets were not being counted toward the student contribution in the SAI, requiring reprocessing
- March 22, 2024:** ED notified by an FAA that IRS FA-DDX appears to be transferring incorrect figures for education credits
- March 29, 2024:** ED announces it is aware of reports concerning tax data provided on the Institutional Student Information Records (ISIRs) for 2024-25 FAFSA applications
- March 30, 2024:** ED updates March 29 Electronic Announcement regarding potential incorrect FTI data transferred from ED. Confirms <20% of applications are impacted. Confirms issues of "some fields are a mix of updated and original returns", education credit data inaccurate, manual entry tax paid and education credits wrong due to discrepancies in the instructions
- April 1, 2024:** ED provides follow-up on three separate incorrect tax data issues. Shares that it will only reprocess records if reprocessing would result in a lower SAI but that institutions can use PJ to use existing (incorrect) data or request reprocessing but that ED will assume schools will use incorrect data to make financial aid decisions

KEY Red = Late announcement or release | Orange = Department of Education error
Blue = NASFAA action/communication

Withdrawal Survey Update

Withdrawal Survey: Insights and Recommendations



Mason Healy-Patterson, Dr. Matt Stillman, & Dr. Carrie Vath
June 20, 2024

- I. Student Success Landscape
- II. Withdrawal Survey Process
- III. Data Assessment
- IV. Top Reasons Students Report Leaving
- V. Clinical Lens Assessment
- VI. Summary and Recommendations

Multicultural
LGBTQ
Economic
Age
Neurodiversity



INCLUSION

Counseling
Belongingness initiatives
Wellness programs
Social development
Self-education



MENTAL HEALTH

**30
STUDENT
SUCCESS
PRIORITIES
for the 2020s**

Transfer
Stop-Outs
Degree completers
Online and flexible
learners
Non-degree programs



**NEW
PATHWAYS**

Courses and programs
Pedagogy
Advising
Academic support
Developmental education



ACADEMICS

Tuition
Financial aid
Basic needs support
Childcare
Work-schedule flexibility



FINANCES

Workforce alignment
Career preparation
Job placement
Employer demand
Wage leverage

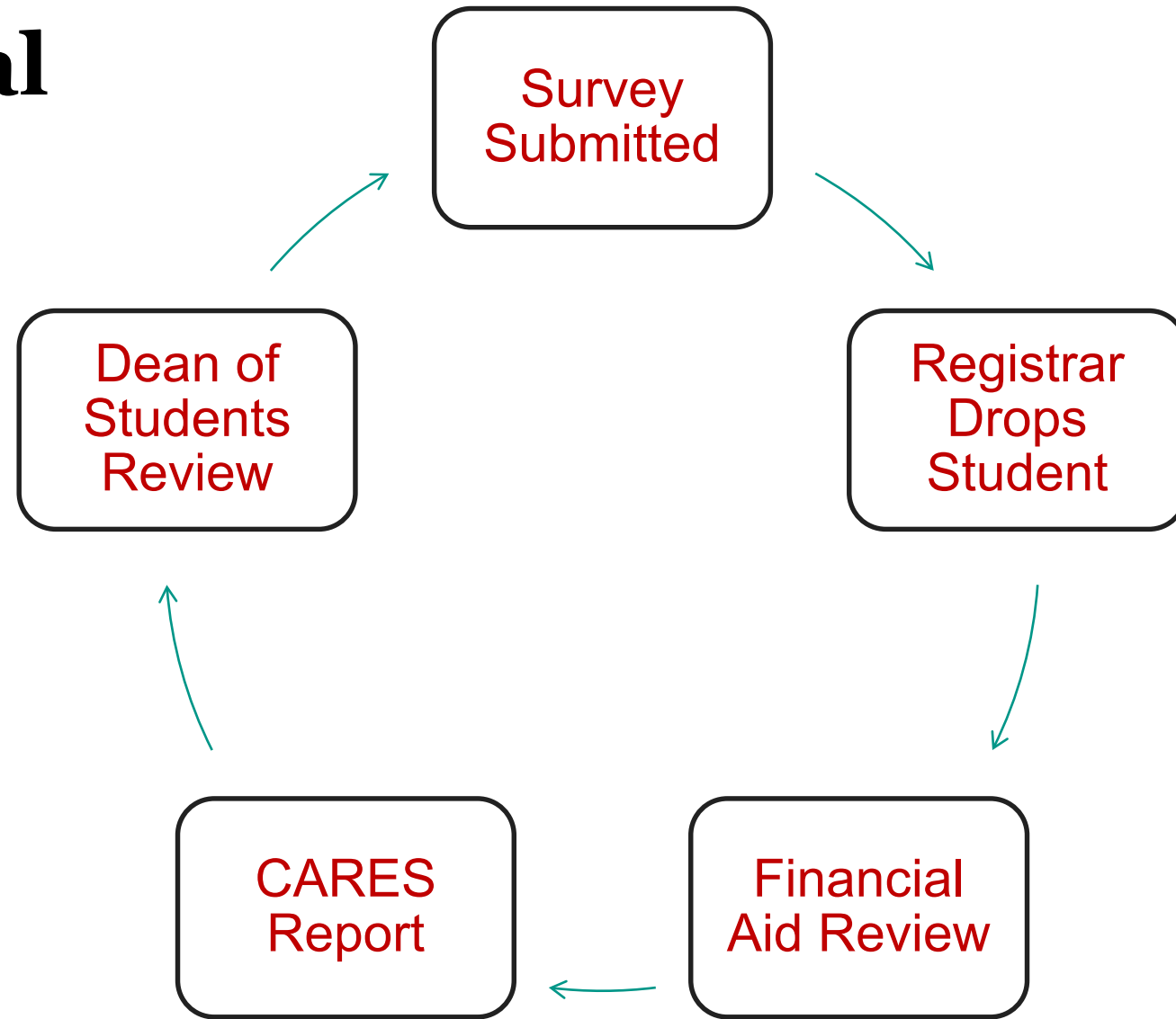


**RETURN ON
INVESTMENT**

According to a recent white paper by togetherall.com (<https://togetherall.com/en-gb/campaigns/supporting-gen-z-whitepaper/>):

1. Student distress has increased significantly in recent years, even before the pandemic's onset
2. Distressed students are seeking support and help in greater numbers at university counseling services
3. Students are presenting at university counseling services with more serious levels and types of distress
4. Students are sharing their distress more openly (e.g., in their classes, with staff, on their university admissions applications)

Withdrawal Survey Process



Withdrawal Surveys

AY 21-22 = 742 (Covid)

AY22-23 = 563

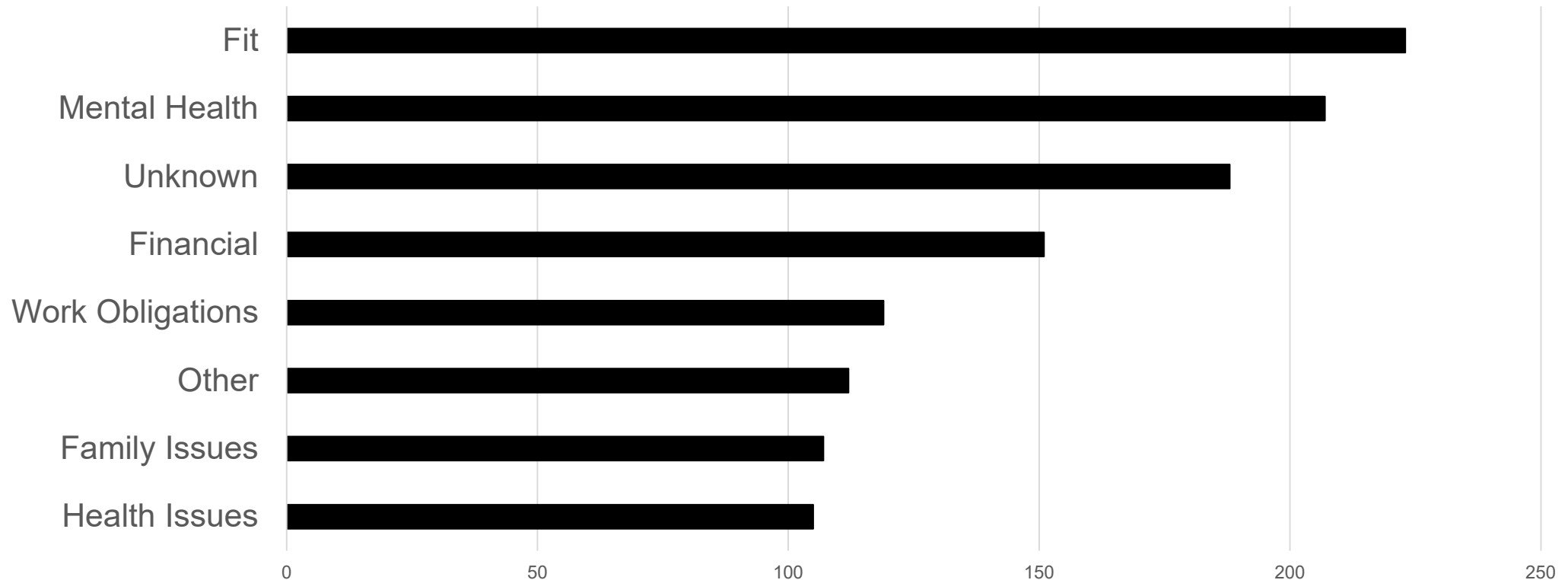
AY23-24 as of 6/1 = 402

Data Assessment

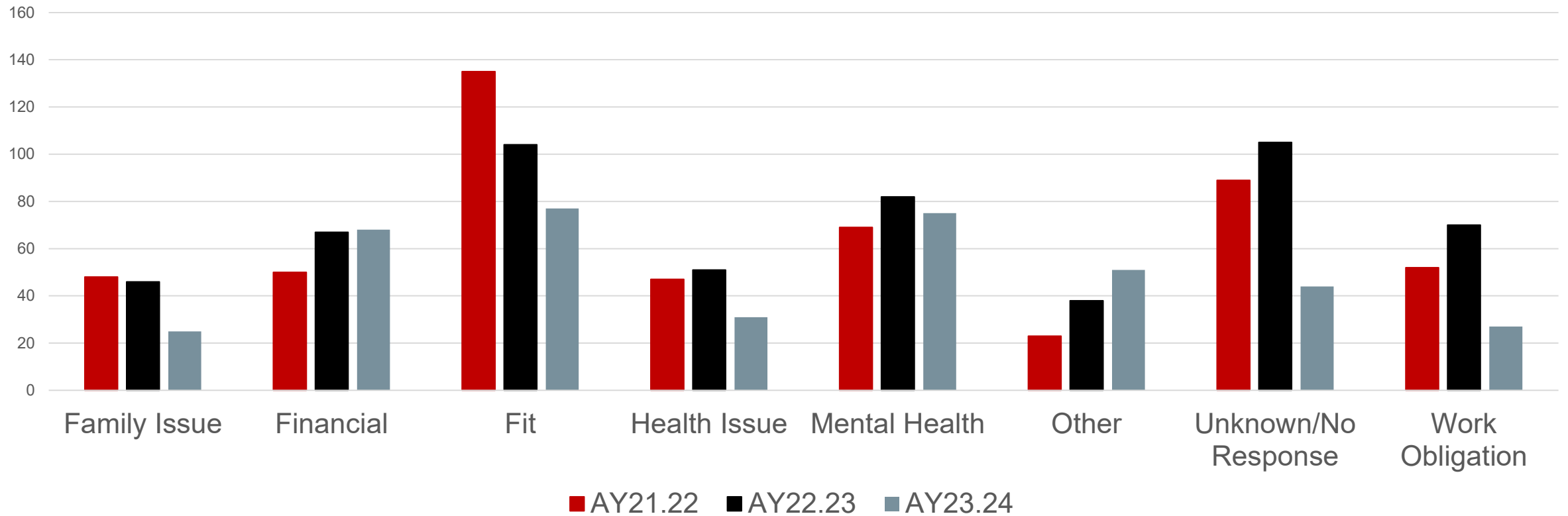
- Students provide a narrative answer: “Tell us more about your reasons for dropping all your classes and/or leaving SOU”
- Response categorized into one of the following: Family Issue, Financial, Fit, Mental Health, Health Issue, Family Issue, Work Obligation, Other, and Unknown/No Response
- Previously compared students who withdrew and students who did not return
 - Did not see any significant differences by race, gender, residency status, academic standing, etc.
 - Did see significant differences based on class standing (First and Second-year students Fit and Mental Health; Third and Fourth-year students Family Issues and Mental Health) and period (Before Term = Financial & Fit, Early = Fit; Late = Mental Health)

Top Reasons Students Report Leaving

AY's 2021-2024

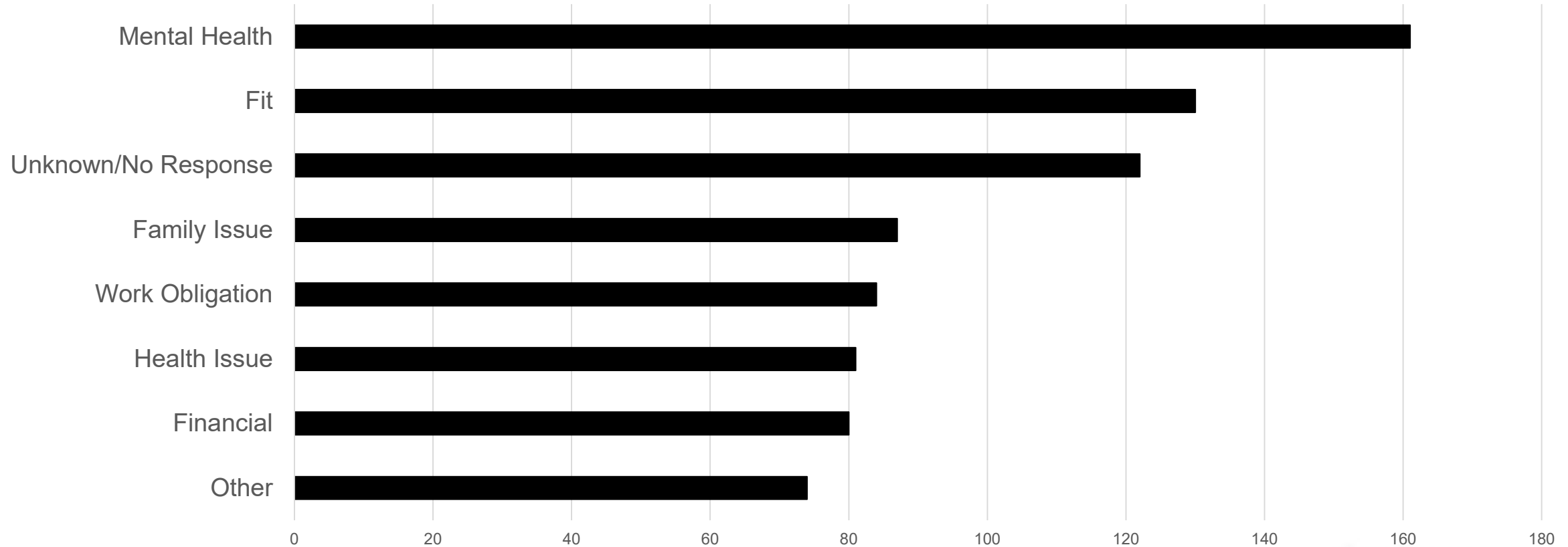


Trends by Academic Year



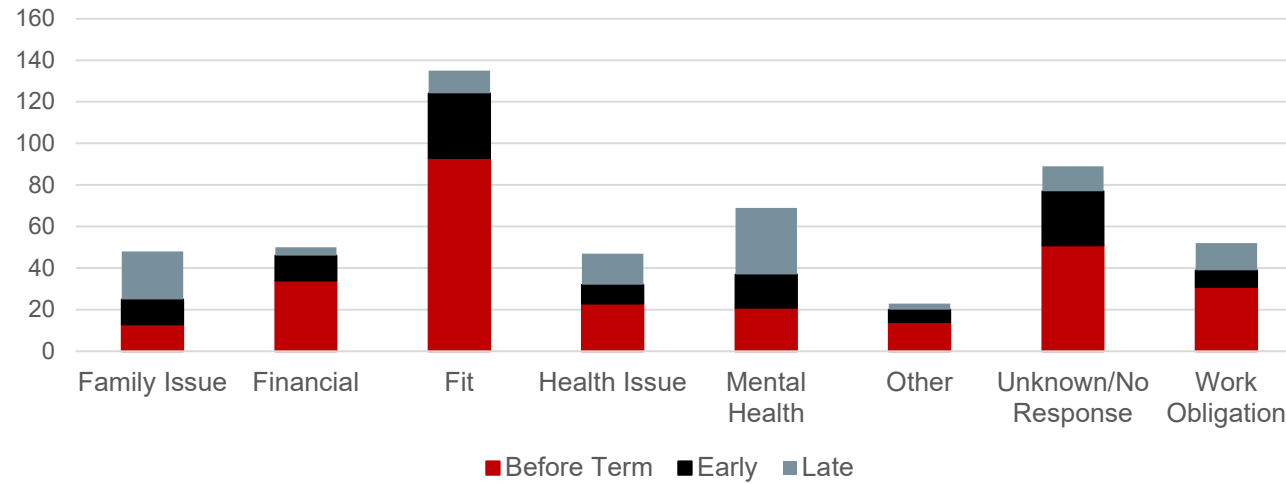
Top Reasons Students Report Leaving (Early & Late Periods Only)

AY's 2021-2024

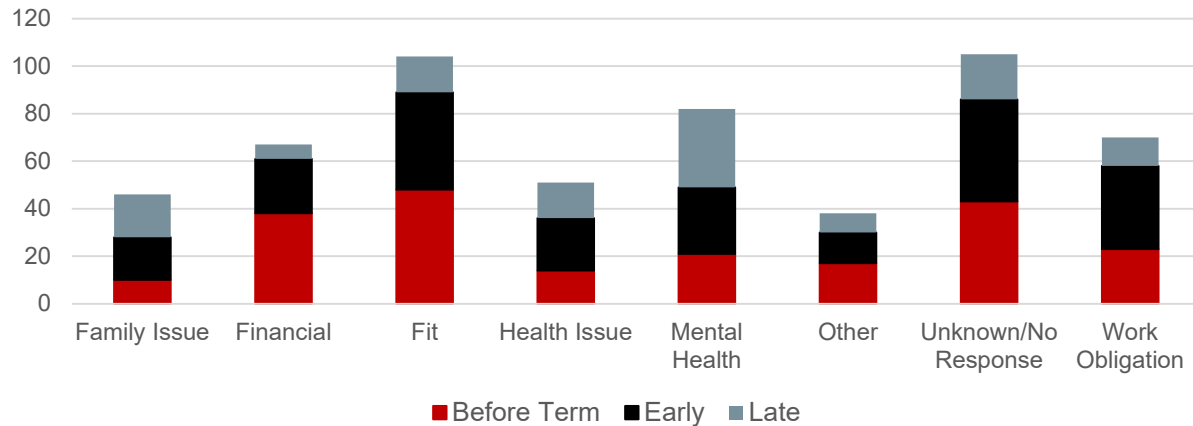


Trends by Period

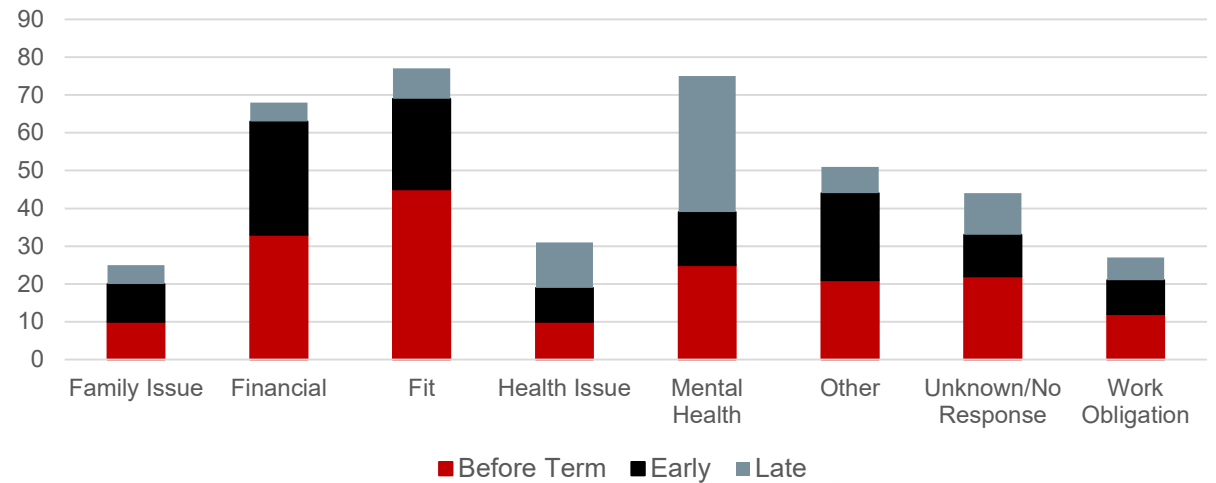
AY21.22



AY22.23



AY23.24



Before= Before the first day of classes **Early**= 100% refund **Late** = No refund

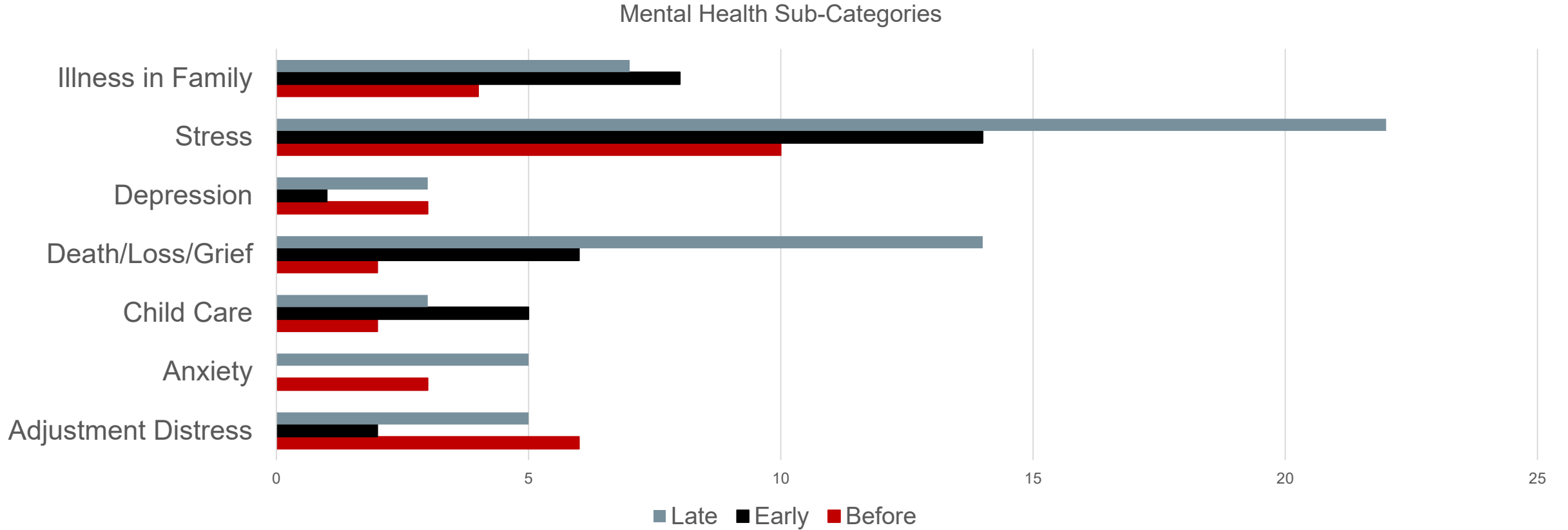


Applying a Clinical Lens to Responses



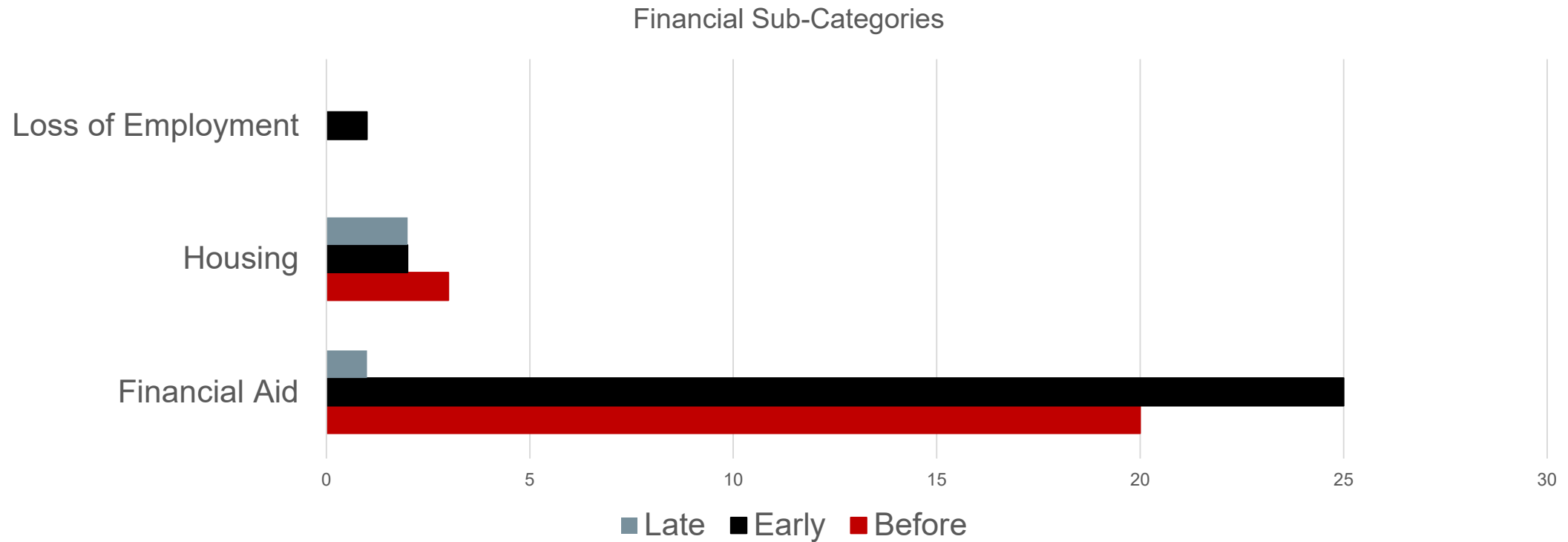
- Student Health and Wellness Center Counselor reviewed and categorized responses
 - Had over a 95% match with the previous categorization
- Developed subcategories for Mental Health and Financial
 - Resulted in 15 subcategories
- Analyzed the results by period and subcategories

Trends by Mental Health Sub-Categories (AY's 2021-2024)



Before= Before the first day of classes **Early**= 100% refund **Late** = No refund

Trends by Financial Sub-Categories (AY's 2021-2024)



Before= Before the first day of classes Early= 100% refund Late = No refund

Summary

- Mental Health and Fit are top two reasons students report leaving overall regardless of time period
- Financial and Fit are the top two reasons students leave before the first day of classes
 - The gap between aid offered and aid needed is too large for many students
- Stress is the top challenge reported by students

Recommendations

- Collaborate with Financial Aid, Business Services, Benefits Navigator, and Admissions to help students understand finances BEFORE students enroll
- Focus on building programs that support students' transition to college
- Focus on building programs that take a proactive approach to stress and time-management
 - Promote Telus self-assessments
 - Develop Self-assessment during orientation/move-in

Future Meetings

Adjournment