



Public Meeting Notice

October 9, 2025

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

FROM: Sabrina Prud'homme, University Board Secretary

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

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

There are several reports on the committee's agenda, including a provost's report, including organizational updates, resiliency plan implementation, and updates regarding the Statewide Provost's Council. The Student Affairs report includes information about SOU's new student orientation program and the Student Affairs Strategic Plan. The admissions and financial aid report will provide an update on fall 2025 admissions, including a review of the admissions funnel. An enrollment management report will review student completions, enrollment, and student demographic data. The committee will also discuss a report on the Core Information System Replacement Project for students.

Other information and discussion items on the agenda include updates regarding university accreditation and significant student account balances. There will also be a student leadership spotlight on two student leaders.

The committee will also act on a proposed meeting schedule of the committee for 2026 and 2027.

Please note the new starting time of this meeting, which will occur as follows.

Thursday, October 16, 2025

1:00 p.m. to 4:00 p.m. (or until business concludes)

Visit governance.sou.edu for the meeting materials.

SOU Ashland Campus, Hannon Library, Meese Room

1290 Ashland Street, Ashland, OR, 97520

To view the proceedings, visit <https://sou.zoom.us/j/81380640958> at the time of the meeting.

If ADA accommodations are required for persons with disabilities, please contact Holly Frazier at (541) 552-8055 or email trustees@sou.edu. Accommodation requests should be made at least 72 hours in advance.

Public Comment

The Board of Trustees welcomes public comment. Members of the public who wish to provide live public comments in person or remotely during the meeting are invited to sign up to speak at least 24 hours in advance of the meeting. Public comments also may be provided in writing. Public commenters may sign up in advance or may submit their written comments via email to the Board of Trustees email address: trustees@sou.edu. Public comments also may be delivered by hand or mailed to SOU Board of Trustees, 1250 Siskiyou Boulevard, Churchill Hall, Room 107, Ashland, OR 97520. Commenters may also contact the Office of the Board of Trustees by phone at (541) 552-8055 and provide their name, email address, phone number, relationship to SOU, and the subject of their public comments to sign up by phone.



Board of Trustees
Academic and Student Affairs Meeting
October 16, 2025

Call to Order / Roll / Declaration of a Quorum



Board of Trustees
Academic and Student Affairs Committee Meeting

Thursday, October 16, 2025
1:00 p.m. – 4:00 p.m. (or until business concludes)
Meese Room, Hannon Library, SOU Campus
Zoom: <https://sou.zoom.us/j/81380640958>

AGENDA

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

- | | | | |
|-----------|----------|---|--|
| 1:00 p.m. | 1 | Call to Order/Roll/Declaration of a Quorum | |
| | 1.1 | Welcome and Opening Remarks | Chair Brent Barry |
| | 1.2 | Roll and Declaration of a Quorum | Sabrina Prud'homme,
SOU, Board Secretary |
| | 1.3 | Agenda Review | Chair Brent Barry |
| | 1.4 | Student Leadership Spotlight | Elena Pereira, SOU,
Student; Maya P. Daniels,
SOU, Student |
| 1:20 | 2 | Public Comment | |
| | 3 | Provost's Report | Dr. Casey Shillam, SOU,
Provost and Executive Vice
President for Academic and
Student Affairs |
| 1:35 | 3.1 | Organizational Updates | |
| 1:45 | 3.2 | Resiliency Plan Implementation | |
| 2:05 | 3.3 | Statewide Provost's Council Updates | |
| 2:15 | 4 | Student Affairs Report | Dr. Carrie Vath, SOU,
Assistant Vice President of
Student Life and Dean of
Students |
| | 4.1 | New Student Orientation Update | |
| | 4.2 | Student Affairs Strategic Plan Program Reviews | |
| 2:35 | | BREAK | |

**Southern Oregon University
Board of Trustees
Academic and Student Affairs Committee Meeting
October 16, 2025**

AGENDA (Continued)

2:45	5	Admissions and Financial Aid Report	Zac Olson, SOU, Assistant Vice President of Enrollment Services
	5.1	Fall 2025 Admissions Update and Review of Admissions Funnel	
3:00	6	Enrollment Management Report	Zac Olson; Dr. Carrie Vath
	6.1	Student Completions Report	
	6.2	Review of Enrollment and Student Demographic Data	
	7	Information, Discussion, and Action Items	
3:15	7.1	Accreditation Update	Dr. Dan DeNeui, SOU, Associate Provost; Joe Jackson, SOU, Lead Analyst, Institutional Research
3:25	7.2	Significant Student Account Balances	Dr. Carson Howell, SOU, Vice President for Finance and Administration; Stephanie Hannigan, SOU, Associate Director for Business Services
3:40	7.3	Student Core Information System Replacement Project (CISR) Report	Hart Wilson, SOU, CISR Project Manager
3:50	7.4	2026-2027 Committee Schedule and Future Meetings (Action)	Chair Brent Barry
4:00 p.m.	8	Adjournment	Chair Brent Barry

Student Leadership Spotlight

Student Spotlight: Leading the Raider Way

Elena Pereira

- Criminal Justice Major, Sophomore
- Served as ASSOU Multicultural Senator AY24-25
- Member of 4 clubs
- Participated in Bridge Program
- Member of ROTC
- Student Worker in Belonging & Engagement
- Orientation Leader
- From American Samoa



Maya P. Daniels

- Theatre Major, Junior
- Secretary of Actors Club
- Participated in Bridge Program
- Student Worker in Belonging & Engagement
- Orientation Leader
- From Troutdale, Oregon

Public Comment

Provost's Report



Academic and Student Affairs Committee

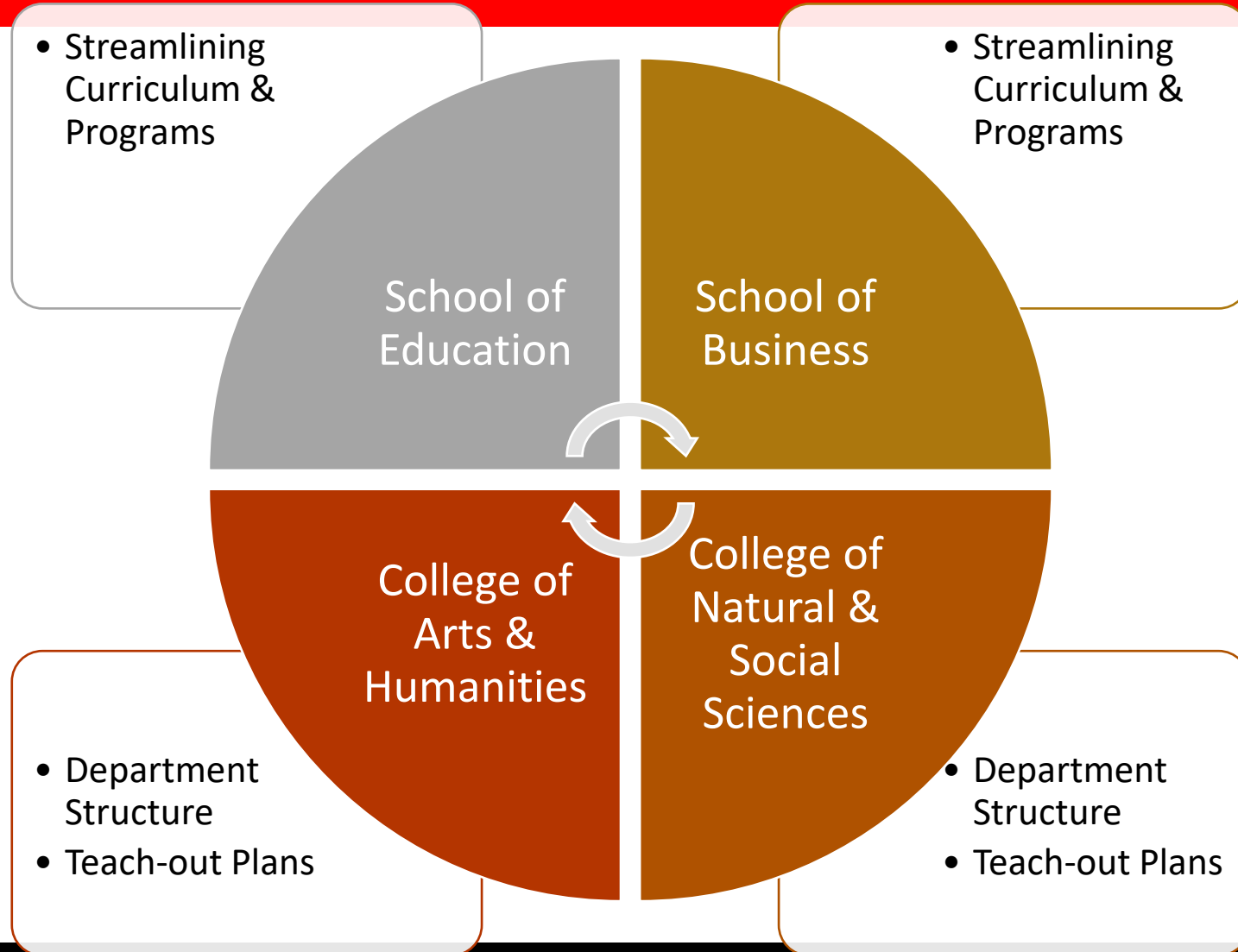
Provost Report: October 16, 2025

Casey R. Shillam, PhD, RN, FAAN
Executive Vice President & Provost



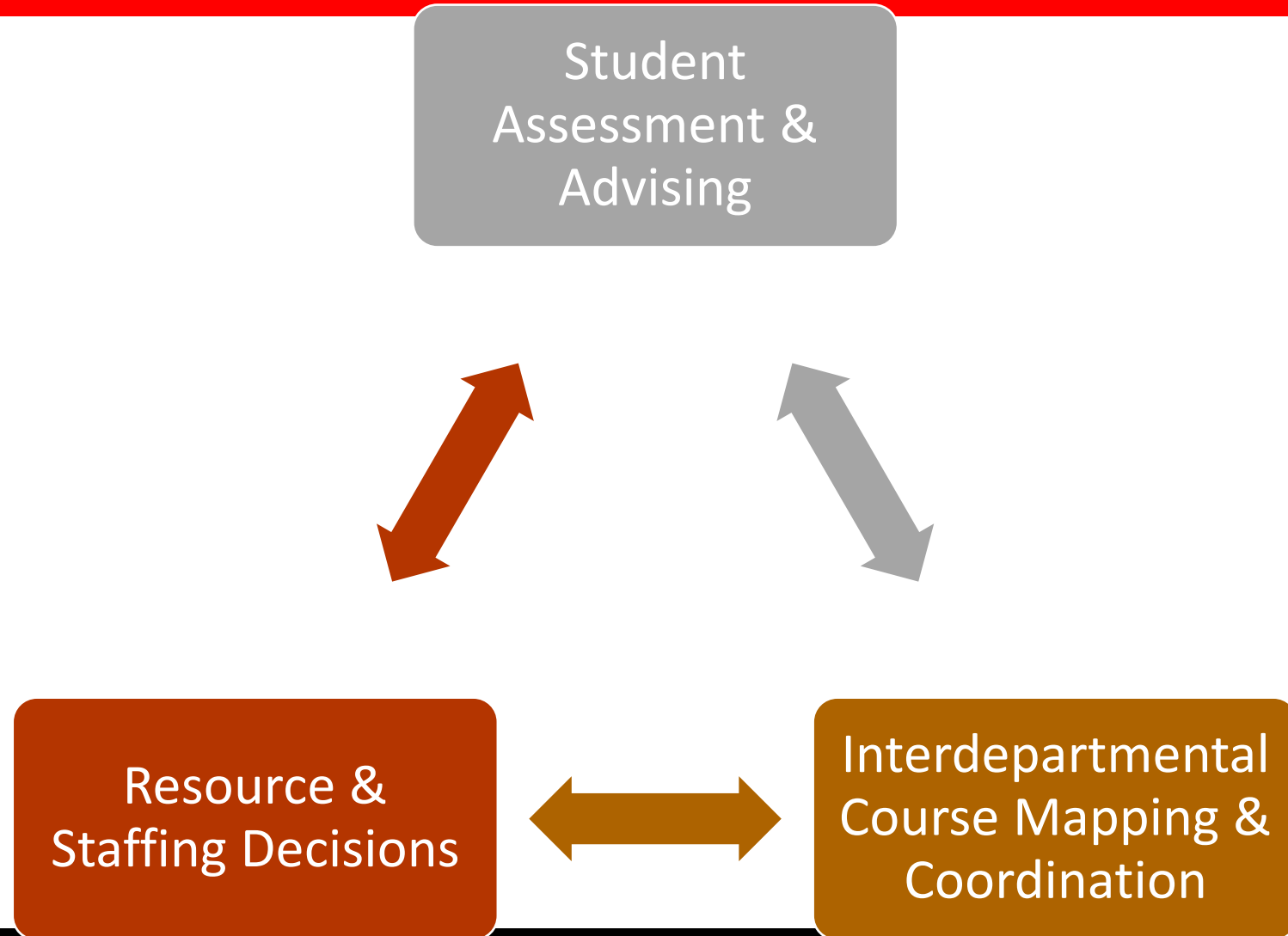


Completing Organizational Changes





Resiliency Plan Implementation





Resiliency Plan Implementation

Resiliency Plan Implementation

Dialogue – what
questions do you have?





Searches Underway

Hannon Library Dean

- Chaired by Interim Dean Walcher
- Posted position

School of Business Dean

- Chaired by Dean Longhurst
- Post position by end of October



Statewide Provost's Council

BASE collaboration and RCC Partnership

Transfer Council Efforts

Statewide Chief Academic Officer meeting

Student Affairs Report

Student Affairs Report

Cause Awareness: October

Hispanic Heritage
Domestic Violence Awareness
LGBT History Month
Breast Cancer Awareness
National ADHD Awareness



Cause Awareness:

World Mental Health Day 10/10
National Coming out Day 10/11
International Day of the Girl 10/11
Indigenous Peoples' Day 10/13
World Food Day 10/16
National Day of the Deployed 10/26
Make a Difference Day 10/25
National First Responder Day 10/28

Dr. Carrie Vath
October 16, 2025

New Student Orientation & Weeks of Welcome

- University Housing moved in 700 new and returning students
- Week of Welcome Programs (# of Student Participants):
 - HydroHunt ~250
 - Movie Night ~ 100
 - Class Photo ~150
 - Meet Your Major ~ 150
 - Ice Cream Social ~ 257
 - Tail Gate ~ 150
 - Sunday Excursions ~ 210
 - Amazing Race ~ 100
 - Food Pantry Bingo ~ 120
 - 90's Nostalgia ~ 105
- GlowFest ~ 320 students attended
- Meet Ashland had 28 Community Partners participate
- 35 Clubs/Orgs participated in the Involvement Fair
- Over 100 students participated in the SOPride Parade





Crafternoon



SO Southern OREGON UNIVERSITY

Food Pantry

- World Food Day (10/16) promotes global awareness and action for those who suffer from hunger and highlight the need to ensure healthy diets for all.
- Establishing Relationship with Ashland Food Co-Op
- \$1,700 Grant will be used to purchase new freezer and Food items for freezer

“It's really nice having options if I have to wait to go shopping or need something during a hard/busy day. It provides enough options to get some of the weight of grocery expenses off of your shoulders while you focus on schooling.”

“The are a few times a month after paying bills that I have to wait to get paid again before buying food so this helps get me over that hurdle.”



2024-2025	Count
# of individuals utilizing pantry	551
# of visits to the pantry	2,654

22% increase in visits from AY23.24

food pantry	
FALL TERM HOURS	
Monday	9:00am - 5:00pm
Tuesday	9:00am - 8:00pm
Wednesday	9:00am - 5:00pm
Thursday	9:00am - 5:00pm
Friday	9:00am - 8:00pm
Saturday & Sunday	Closed

Extended hours for Fall Term



Sensory Room Established Stevenson Union room 323



What is a sensory room?

A sensory room is space that provides individuals with a controlled and immersive sensory experience.

Here is how a sensory room most commonly uses our senses:

- **Visual Stimulation:** such as dimmable LED lights with calming colors
- **Auditory Stimulation:** we incorporate various sounds and auditory experiences
- **Tactile Stimulation:** can provide comforting sensations.
- **Interactive Sensory Equipment:** we have specialised sensory equipment such fidget toys, stress balls etc
- **Kinesthesia (movement) Stimulation:** we have three different forms of seating that use swinging, bouncing, and balancing.

Who Can benefit from a Sensory room?

Everyone AND

- Individuals with ADHD
- People with Anxiety or Stress
- Individuals with Sensory Processing Disorders (SPD)

Check in at the Dean of Students Office(SU 321) for your sensory room experience.

What students are saying:

"I love that I can connect my Bluetooth to the light machine and listen to my own music on a speaker while I relax in the massage chair!"

"This really grounded me, I liked the posters and artwork. Thank you for this resource."

"The silence was perfect for getting work done with little distractions but still having the ability to fiddle with the fidget toys"

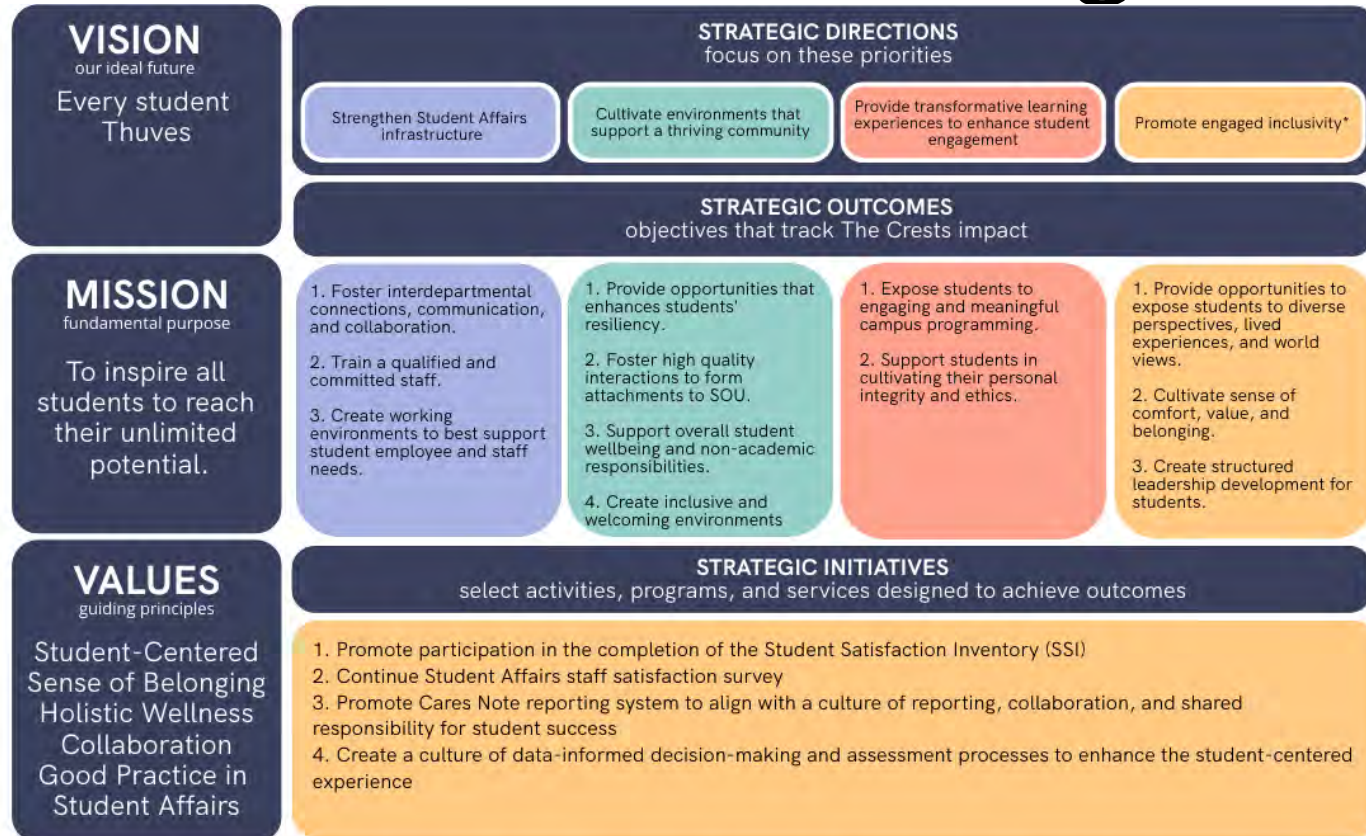
AY24.25 Usage
150 Individuals

Satisfaction with Space
91% Excellent
8% Great

Questions?



Student Affairs Strategic Planning



*Engaged inclusivity = "transforms the dialogue on inclusion from general acceptance and tolerance of differences to active institutional transformation based on the belief that the richness of our culture is because of our diversity and a recognition of our common humanity." (From Equity Talk to Equity Walk: Expanding Practitioner Knowledge for Racial Justice in Higher Education, by Tia Brown McNair, 2020)

Dr. Carrie Vath
October 16, 2025

Where we were one year ago: The Year Ahead

- Use baseline data for meaningful improvements
- Housing satisfaction survey will be administered in November instead of May to address concerns sooner.
 - Focus more programming and education on conflict resolution
- Creating/Fostering Data Literacy and culture of continuous improvement and celebration of successes
- Focus on Six Basic Needs of Customer Experience (Friendliness – the most basic and associated with courtesy and politeness. Empathy – the customer needs to know that the service provider appreciates their wants and circumstances. Fairness – the customer wants to feel they receive adequate attention and reasonable answers. Control – the customer wants to feel his/her wants and input influences the outcome. Information – customers want to know about products and services but in a pertinent and time-sensitive manner.)
- Utilize Navigate360 to identify students who are not engaging and develop proactive outreach for that population

What we have accomplished so far...

- Revised Conduct Data Collection, Revised Club Leader Training, and Revised Cares and Alerts system
- Housing Survey had a 38% response rate. Key results were communicated back to students in January.
- Implemented Data Literacy and culture of continuous improvement and celebration of successes
- Increased Utilization of Navigate360



Director of Advising & Orientation (& Student Success Coordinators) Join Student Affairs Division

Why create a Director of Advising & Orientation role:

- **Unified vision and leadership:** Provides clear oversight of advising and onboarding, ensuring alignment with institutional goals and student success initiatives.
- **Strategic coordination:** Facilitates data-informed decision-making, assessment of advising outcomes, and integration of orientation with ongoing student support.
- **Professional support for advisors:** Ensures SSCs have leadership focused on their development, advocacy, and continuous improvement of advising services.

Benefits of a centralized, embedded Student Success Coordinator (SSC) model:

- **Consistent advising standards and accountability:** Centralized reporting ensures consistent training, professional development, and assessment, reducing silos and uneven student experiences across departments.
- **Enhanced faculty partnership:** By being embedded in academic departments, SSCs remain accessible to faculty and students, strengthening collaboration while still benefiting from centralized coordination.
- **Improved student experience:** Students receive cohesive, high-quality advising that is both discipline-specific and aligned with institutional policies, ensuring clarity and continuity across their academic journey.
- **Operational efficiency:** Centralized supervision streamlines communication, reduces duplication of effort, and allows flexible deployment of SSCs where student demand is greatest.

Questions?

Admissions and Financial Aid Report

October Updates

Admissions, Financial Aid, Raider Student Services, Outreach & Engagement



Zac Olson, Assistant Vice President of Enrollment Services
Oct 16, 2025

Funnel Report: New Applicant Headcount by Student Type
Fall 2024 Week Ending 9/29/24 vs. Fall 2025 Week Ending 9/28/25
1 Week After Start of Term

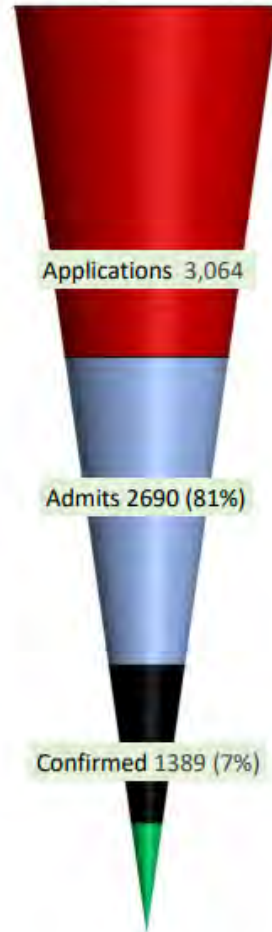
Applications				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	1,166	1,116	-50	-4.3%
Freshmen - Nonresident	1,033	848	-185	-17.9%
Transfer - Resident	304	330	26	8.6%
Transfer - Nonresident	211	231	20	9.5%
Postbacs/Grads	350	345	-5	-1.4%
Total Apps	3,064	2,870	-194	-6.3%

Admits				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	1,097	1,035	-62	-5.7%
Freshmen - Nonresident	934	768	-166	-17.8%
Transfer - Resident	258	291	33	12.8%
Transfer - Nonresident	172	169	-3	-1.7%
Postbacs/Grads	229	229	-	0.0%
Total	2,690	2,492	-198	-7.4%

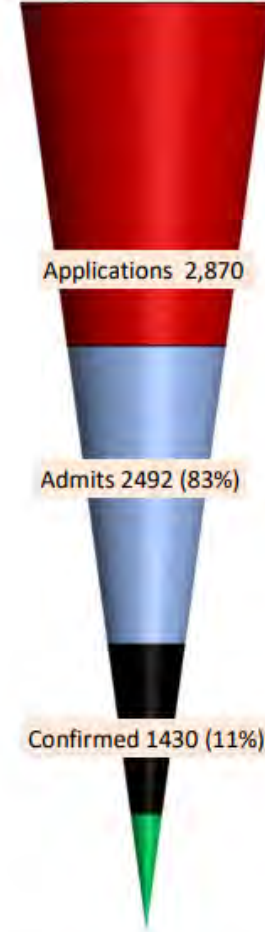
Confirmed				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	496	506	10	2.0%
Freshmen - Nonresident	293	309	16	5.5%
Transfer - Resident	242	249	7	2.9%
Transfer - Nonresident	129	137	8	6.2%
Postbacs/Grads	229	229	-	0.0%
Total	1,389	1,430	41	3.0%

Enrolled				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	340	351	11	3.2%
Freshmen - Nonresident	194	164	-30	-15.5%
Transfer - Resident	186	200	14	7.5%
Transfer - Nonresident	94	89	-5	-5.3%
Postbacs/Grads	149	161	12	8.1%
Total	963	965	2	0.2%

Fall 2024 Total Apps



Fall 2025 Total Apps



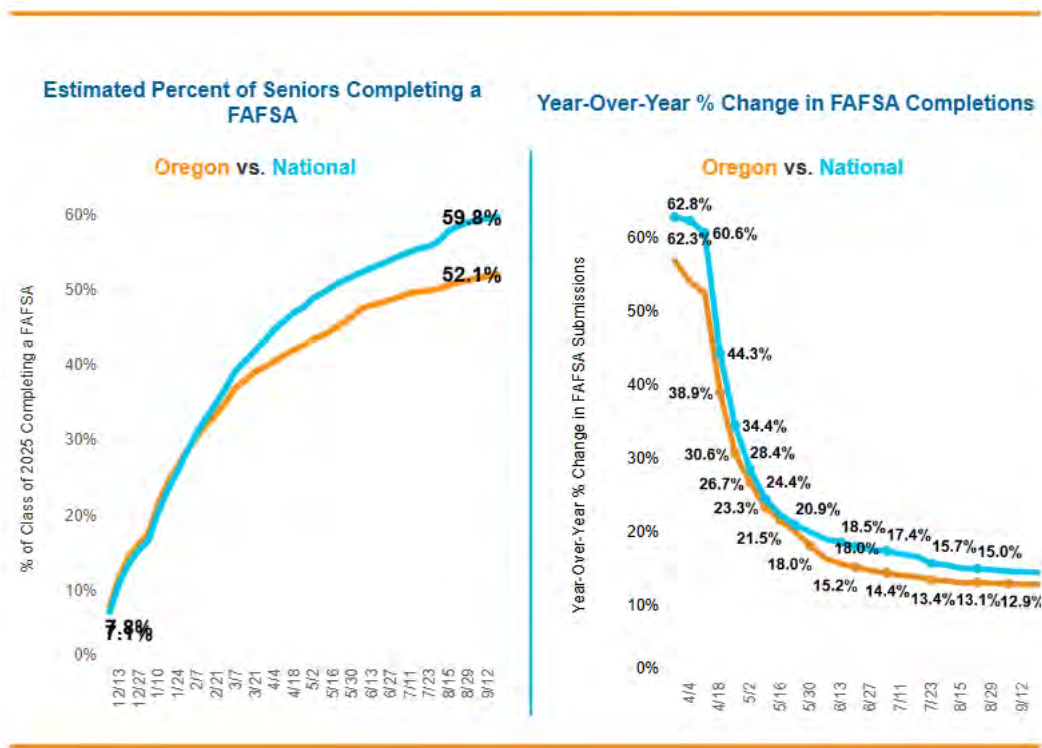
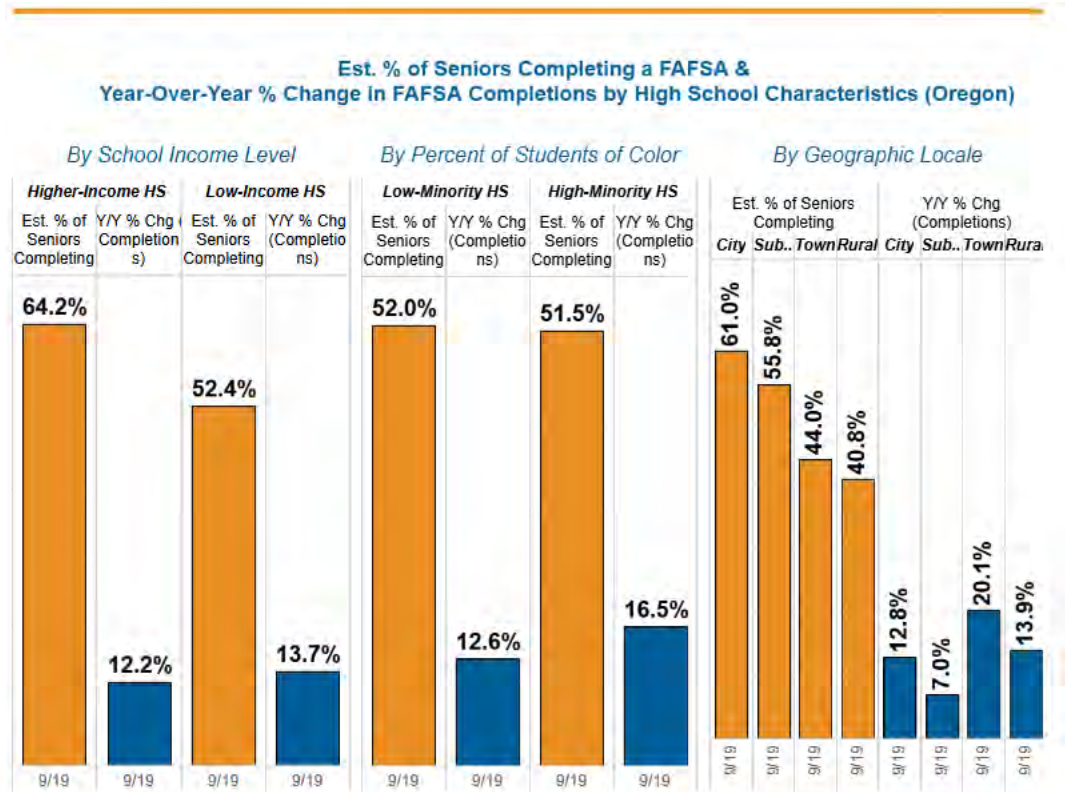
FAFSA Tracker

National College Attainment Network (NCAN)

State Profile: Oregon

Through **September 19, 2025**, **52.1%** of the **high school class of 2025** in Oregon has completed a FAFSA.

There have been **26,123** submissions in Oregon, a **12.9%** change (**2,978 completions**) compared to last FAFSA cycle through the same date.



Historic Yield

		Application to Enrolled					
		Fall 2020	Fall 2021	Fall 2022	Fall 2023	Fall 2024	5-year Avg
FY - Resident	Applications	1094	924	1118	1150	1168	1090.8
	Enrolled	331	317	338	386	342	342.8
	Yield	30.26%	34.31%	30.23%	33.57%	29.28%	31.43%
FY - Nonresident	Applications	1223	946	970	1139	1032	1062
	Enrolled	239	187	208	259	194	217.4
	Yield	19.54%	19.77%	21.44%	22.74%	18.80%	20.47%
TR - Resident	Applications	406	348	286	340	304	336.8
	Enrolled	232	217	181	194	188	202.4
	Yield	57.14%	62.36%	63.29%	57.06%	61.84%	60.10%
TR - Nonresident	Applications	356	277	218	266	212	265.8
	Enrolled	148	150	102	116	96	122.4
	Yield	41.57%	54.15%	46.79%	43.61%	45.28%	46.05%
Total	Applications	3079	2495	2592	2895	2716	2755.4
	Enrolled	950	871	829	955	820	885
	Yield	30.85%	34.91%	31.98%	32.99%	30.19%	32.12%

Office of Admissions

- Fall 2026 Recruitment Season!
 - HS/CC Visits (276); College Fairs (186); Application Workshops (49)
- Updated Communication Architecture 125-point (print, email, text, phone, social, web)
- Campus Visits (over 2500 campus visitors in 2025)
 - Daily Tours; Group Tours; Raider for a Day; Preview Days
 - Preview Days 25-26 (Nov 14, Feb 27, April 10)
- Workday Application is Live!
- New Automatic Merit Award (Remissions Model)
- Common Application implementation
- Staffing Updates
- International Programs
 - New location (Welcome Center)



Ian Parent, Director



Pam Chapin, Associate Director



Tatijanna Winn, Counselor



Allie Hartman, Counselor



Trystan Stephens-Tregarth, Counselor



Financial Aid

- The 2026-27 FISAP and FVT/GE reports have been submitted, and work study and SEOG funds for next year were requested.
- Financial aid staff continued outreach efforts, participating in more than 10 workshops and events during September and October.
- FAFSA submissions are up, with SOU receiving nearly 700 more than at the same point last year.
- Financial Aid Counselor Rob Kever is serving as a VP for the Oregon Association of Student Financial Aid Administrators and will be representing SOU as a member of the State Advocacy Network for the National Association of Student Financial Aid Administrators.



Federal Loan Changes – Effective July 1, 2026*

- **Loan Proration** – Loan amounts tied to enrollment level.
 - In 2024, 20% of SOU loan recipients were less than full time for at least one term.
- **Graduate PLUS Loans** – Program eliminated (previously unlimited).
 - In 2024, 99 SOU students borrowed \$1,086,240 in Grad PLUS loans.
- **Parent PLUS Loans** – Limited to \$20,000 per year / \$65,000 aggregate per student (previously unlimited).
 - In 2024, 45% of SOU Parent PLUS loans were over \$20,000.
 - Limit would have reduced Parent PLUS borrowing by \$510,465.
- **Graduate Loans** – Aggregate capped at \$100,000 (down from \$138,500).

**Legacy provisions apply*

Financial Aid Proposed Changes – **Not Taking Effect**

The following proposals were in earlier drafts of the OBBBA but were not included in the final version.

- Subsidized Loan Program** – No changes. Earlier drafts proposed eliminating subsidized loan program.
- Pell Grant Enrollment** – No changes. Earlier drafts proposed changing full-time enrollment for Pell eligibility, and removing Pell for less-than-half-time enrollment.
- Non-Citizen Eligibility** – No changes. Earlier drafts proposed eliminating Title IV eligibility for certain non-citizens.

Raider Student Services

- New Location in SOU Bookstore!
- Expanded Hours
- Serving students, staff, and faculty for questions regarding Financial Aid, Registration, Billing & Student Accounts
- Drew O'Deay in lead role
- Campus awareness campaign underway
- Special thanks to all those involved
 - FMP, IT, Contractors, Barnes & Nobles; RSS team; and more!



Outreach and Engagement

- SOU Youth Programs hosted over 300 students this summer for overnight camps.
- Academy took place the last week of June and 94 youth from 33 schools participated.
- Konaway Nika Tillicum - 58 youth participated from 45 different schools. This year's program also included an art-based pre-camp pilot program that was done in collaboration with the Oregon Shakespeare Festival and supported by donor funds. 8 youth participated in this 3-day program.
- Black Youth Summer Institute - 49 youth participated from 21 different schools.
- Academia Latina Leadership - 30 youth from 11 schools participated.
- Academia Latina 82 youth participated from 22 schools.
- Current and Upcoming Programs
 - Advanced Southern Credit fall term
 - Middle School and High School Scavenger Hunt - 22 schools currently signed up to participate
 - Pirates to Raiders - Our partnership with the Phoenix-Talent School District that supports Latino/a/x students



Outreach and Engagement

https://youtu.be/RDrk5Rg_GI0?si=MIV8K7MsjqYJUD3S



Questions?

Enrollment Management Report

Enrollment Management Report



Zac Olson & Dr. Carrie Vath
October 16, 2025

Executive Report

Student Headcounts				
Fall 2024 Week Ending 10/13/24 vs. Fall 2025 Week Ending 10/12/25				
3 Weeks After Start of Term				

	Fall 2024	Fall 2025	Change	% Change	Fall 2024 End of Term	Change	% Change
New Freshmen	532	509	-23	-4.3%	532	-23	-4.3%
New Transfers	278	277	-1	-0.4%	278	-1	-0.4%
New PostBacs/Graduates	153	163	10	6.5%	153	10	6.5%
Subtotal - New Students	963	949	-14	-1.5%	963	-14	-1.5%
Continuing Undergraduate Students	1,750	1,694	-56	-3.2%	1,752	-58	-3.3%
Continuing Graduate Students	279	284	5	1.8%	279	5	1.8%
Returning Undergraduate Students	139	131	-8	-5.8%	139	-8	-5.8%
Returning Graduate Students	71	79	8	11.3%	71	8	11.3%
Non-Admitted Students	1,286	1,958	672	52.3%	1,941	17	0.9%
Grand Total - Headcount	4,488	5,095	607	13.5%	5,145	-50	-1.0%
Grand Total - FTE	3,044	3,111	67	2.2%	3,212	-101	-3.1%
Resident	3,353	4,068	715	21.3%	3,976	92	2.3%
Non-resident	1,135	1,027	-108	-9.5%	1,169	-142	-12.1%
International	50	39	-11	-22.0%	52	-13	-25.0%
American Indian/Alaskan Native	52	62	10	19.2%	52	10	19.2%
Asian	69	61	-8	-11.6%	71	-10	-14.1%
Black/African American	67	60	-7	-10.4%	67	-7	-10.4%
Hispanic/Latino	466	431	-35	-7.5%	474	-43	-9.1%
Pacific Islander	25	23	-2	-8.0%	25	-2	-8.0%
North African, Middle eastern, Other	31	37	6	19.4%	32	5	15.6%
Two or More Races	352	329	-23	-6.5%	352	-23	-6.5%
Subtotal - Students of Color	1,062	1,003	-59	-5.6%	1,073	-70	-6.5%
White	1,937	1,763	-174	-9.0%	2,024	-261	-12.9%
Unknown	1,439	2,290	851	59.1%	1,996	294	14.7%
Alaska	32	30	-2	-6.3%	32	-2	-6.3%
California	681	581	-100	-14.7%	718	-137	-19.1%
Hawaii	34	31	-3	-8.8%	34	-3	-8.8%
Idaho	21	36	15	71.4%	21	15	71.4%
Washington	121	107	-14	-11.6%	121	-14	-11.6%
All Other States	196	198	2	1.0%	199	-1	-0.5%

Undergraduate Course SCH by Department
Fall 2024 Week Ending 10/13/24 vs. Fall 2025 Week Ending 10/12/25
3 Weeks After Start of Term

Department	Fall 2024	Fall 2025	Change	% Change
Art and Art History	1,613	1,493	-120	-7.4%
Athletics	477	341	-136	-28.5%
Biology	2,284	2,424	140	6.1%
Business Administration	3,547	3,780	233	6.6%
Chemistry & Physics	1,497	1,074	-423	-28.3%
Communication, Media & Cinema	2,650	2,768	118	4.5%
Computer Science	924	728	-196	-21.2%
Creative Writing	402	320	-82	-20.4%
Criminology & Criminal Justice	1,633	1,534	-99	-6.1%
Economics	896	924	28	3.1%
Education	1,887	1,973	86	4.6%
Emerging Media & Digital Arts	828	1,016	188	22.7%
English Studies	1,350	1,542	192	14.2%
Env. Science, Policy, & Sust	1,528	1,358	-170	-11.1%
Gend,Sexuality,Women's Studies	338	444	106	31.4%
Health & Exercise Science	1,731	1,748	17	1.0%
Healthcare Administration	32	72	40	125.0%
History	1,832	1,588	-244	-13.3%
Honors College	512	466	-46	-9.0%

Department	Fall 2024	Fall 2025	Change	% Change
Innovation and Leadership	40	-	-40	-100.0%
International Studies	160	28	-132	-82.5%
Library & Information Science	40	76	36	90.0%
Mathematics	2,355	2,375	20	0.8%
Military Science	79	79	-	0.0%
Music	1,075	1,111	36	3.3%
Native American Studies	104	72	-32	-30.8%
Outdoor Adventure Leadership	673	372	-301	-44.7%
Philosophy	600	432	-168	-28.0%
Power & Politics	344	456	112	32.6%
Psychology	2,734	2,826	92	3.4%
Sociology & Anthropology	702	705	3	0.4%
Spanish & American Sign Lang.	844	780	-64	-7.6%
Success At Southern	14	10	-4	-28.6%
Theatre	2,042	1,892	-150	-7.3%
UGS - WR 122/Study Abroad/Bridge	3,389	2,974	-415	-12.2%
University Seminar	-	-	-	-
All Undergraduate SCH	41,156	39,781	-1375	-3.3%

Graduate Course SCH by Department
Fall 2024 Week Ending 10/13/24 vs. Fall 2025 Week Ending 10/12/25
3 Weeks After Start of Term

Department	Fall 2024	Fall 2025	Change	% Change
Art and Art History	-	-	-	
Biology	-	-	-	
Business Administration	238	201	-37	-15.5%
Chemistry	-	-	-	
Communication, Media & Cinema	-	-	-	
Computer Science	-	-	-	
Creative Writing	-	-	-	
Criminology & Criminal Justice	-	-	-	
Economics	-	-	-	
Education	1,555	1,466	-89	-5.7%
Emerging Media & Digital Arts	-	-	-	
English Studies	3	-	-3	-100.0%
Env. Science, Policy, & Sust	4	2	-2	-50.0%
Gend,Sexuality,Women's Studies	-	-	-	
Health & Exercise Science	16	20	4	25.0%
Health, P.E., & Leadership	-	-	-	
Healthcare Administration	-	-	-	
History	-	-	-	
Honors College	-	-	-	
Innovation and Leadership	-	-	-	
International Studies	-	-	-	

Department	Fall 2024	Fall 2025	Change	% Change
Library Science	-	-	-	
Master in Bus. Administration	816	950	134	16.4%
Masters in Interdisc. Studies	-	-	0	
Master in Management	-	-	0	
Master in Mental Health Cnsng	582	674	92	15.8%
Mathematics	1	1	0	0.0%
Military Science	-	-	0	
Music	-	-	0	
Native American Studies	-	-	0	
Outdoor Adventure Leadership	158	139	-19	-12.0%
Philosophy	-	-	0	
Physical Education Activities	-	-	0	
Physics	-	-	0	
Political Science	-	-	0	
Psychology	-	4	4	
STEM	-	-	0	
Sociology & Anthropology	-	-	0	
Theatre	-	-	0	
Spanish & American Sign Lang.	8	14	6	75.0%
All Graduate SCH	3,381	3,471	90	2.7%

SCH by Student Level Within Tuition Category
Fall 2024 Week Ending 10/13/24 vs. Fall 2025 Week Ending 10/12/25
3 Weeks After Start of Term

Tuition Category	Fall 2024	Fall 2025	Change	% Change
UG WUE	8,051	7,106	-945	-11.7%
UG Resident	17,668	17,572	-96	-0.5%
UG Jack/Jo Pledge	398	311	-87	-21.9%
UG Non-resident	331	378	47	14.2%
UG Online	8,696	8,173	-523	-6.0%
Subtotal - Undergraduates	35,144	33,540	-1,604	-4.6%
GR Resident	688	744	56	8.1%
GR Non-resident	205	212	7	3.4%
GR AP MBA Online	719	814	95	13.2%
GR AP ED Online	669	636	-33	-4.9%
GR Online	59	79	20	33.9%
GR Education Differential	892	844	-48	-5.4%
Subtotal - Graduates	3,232	3,329	97	3.0%
Subtotal - Core Revenue SCH	38,376	36,869	-1,507	-3.9%
Staff Rates	302	313	11	3.6%
Waived Tuition	283	118	-165	-58.3%
Course Based Tuition	251	242	-9	-3.6%
Advanced Southern Credit	5,277	5,654	377	7.1%
Early Entry HS	48	58	10	20.8%
OLLI	-	2,045	2,045	
Staff Training & Development	215	-	-215	-100.0%
Subtotal - Supplemental Revenue SCH	6,161	8,430	2,269	36.8%
Grand Total - SCH	44,752	45,299	547	1.2%

Top Majors Fall 2025 (as of 10/2/2025)

UG Major	Count
Business Administration	259
Psychology	174
Education	132
Theatre	108
Health & Exercise Science	95
Biology	85
Communication, Media & Cinema	85
Criminology & Criminal Justice	65
Emerging Media + Design	55
Undergraduate Studies	47
Environmental Science, Policy & Sustainability	44
Computer Science	38

GR Major	Count
Business Administration	123
Education	114
Clinical Mental Health Counseling	28
Spanish & American Sign Language	7
Outdoor Adventure Leadership	5

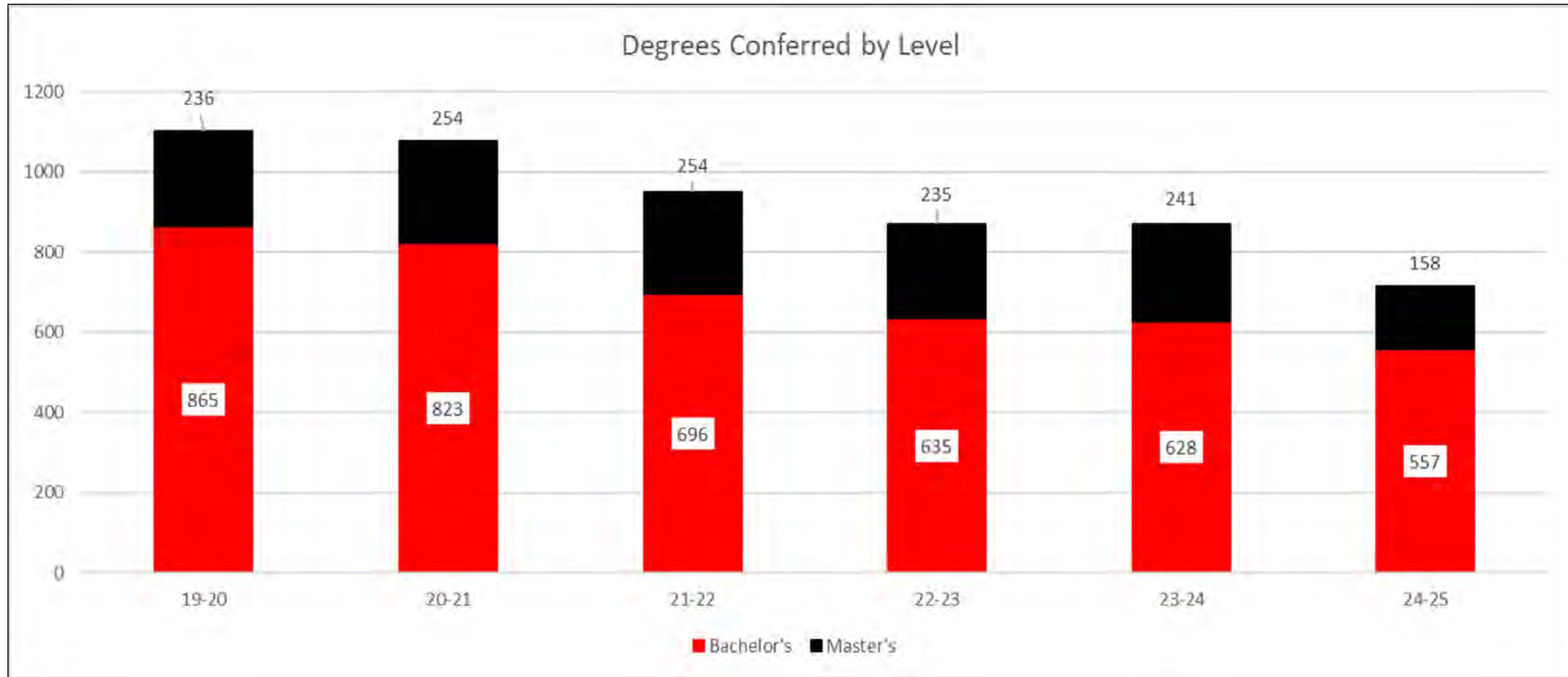
Retention & Persistence- Full-time First-time Freshman (as of 10/2/2025)

Fall to Fall Retention Rate		All UG	Fall Freshman Cohort*
Fall 2023		79.0%	69.1%
Fall 2022		78.4%	68.6%
Fall 2021		76.2%	65.5%
Fall 2020		78.2%	66.7%
Fall 2019		79.8%	67.1%

Fall to Spring Persistence Rate		All UG	Fall Freshman Cohort*
Fall 2024		88.1%	85.9%
Fall 2023		87.4%	85.7%
Fall 2022		86.9%	84.2%
Fall 2021		83.6%	82.7%
Fall 2020		84.7%	80.9%
Fall 2019		87.1%	82.2%

*Fall Freshman Cohorts include incoming First-time Undergraduate Students

Degree Completions (as of 10/2/2025)



Spring-to-Fall Persistence (as of 10/2/2025)

Race/Ethnicity	2021	2022	2023	2024	2025
White	87.3%	87.6%	88.1%	88.6%	88.3%
Unknown or Other	83.0%	85.5%	84.1%	83.9%	87.9%
Hispanic	87.5%	87.1%	88.8%	88.2%	84.6%
Multiple	84.0%	85.9%	84.5%	84.4%	88.2%
Asian	90.6%	89.4%	84.9%	80.2%	88.6%
Black	78.1%	81.7%	69.8%	79.1%	69.0%
Native American	85.4%	85.7%	84.2%	78.9%	87.8%
Middle Eastern	80.0%	91.7%	85.0%	89.4%	70.0%
Pacific Islander	85.7%	75.9%	66.7%	76.9%	68.4%
Pell Recipient	89.2%	90.1%	88.2%	88.2%	85.6%
First Generation	91.0%	89.8%	90.8%	85.5%	81.1%
Underrepresented Minority	85.9%	86.6%	85.2%	86.1%	83.1%
Disabled Students	88.1%	88.9%	87.9%	87.1%	88.0%
All	86.6%	87.0%	86.6%	86.9%	87.2%

Fall 2025 Student Demographics (as of 10/2/2025)

Student Class	Count	%
Freshman (<45 credits)	627	20.16%
Sophomore (45-90 credits)	520	16.72%
Junior (90-134 credits)	688	22.12%
Senior (135+ credits)	742	23.86%
Graduate (Masters)	497	15.98%
Post-Baccalaureate Non-Grad	35	1.13%

Ethnic Groups	Count	%
Asian	63	2.03%
Black	57	1.83%
Hispanic	409	13.15%
Middle Eastern	33	1.06%
Multiple	313	10.06%
Native American	59	1.90%
Pacific Islander	24	0.77%
Unknown or Other	583	18.75%
White	1,569	50.45%

Subpopulation	Count	%
Pell Recipient Students	796	25.74%
Rural Students	665	21.50%
First Generation Students	649	20.98%
Veteran Students	176	5.69%
Underrepresented Minority Students	597	19.30%
Disabled Students	255	8.24%

FT/PT Status	Count	%
Full-time	2,423	77.91%
Part-time	687	22.09%

Gender	Count	%
F	1,613	51.86%
M	1,010	32.48%
N*	487	15.66%

*Students who choose not to identify as Male or Female, either as Non-Binary or choosing not to identify.

Residency	Count	%
Out of State	940	30.23%
In State	2,170	69.77%

Age Group	Count	%
0-18	4	13.00%
18-20	1,013	31.77%
21-24	1,071	33.58%
25-29	349	10.94%
30-39	373	11.70%
40-49	247	7.75%
50+	132	4.14%

Questions?

Accreditation Update

About Accreditation: Frequently Asked Questions

Part 1: What is the NWCCU and What Does it Do?

Question	Answer
What does NWCCU stand for?	Northwest Commission on Colleges and Universities.
What is the NWCCU?	It is an independent, non-profit institutional accrediting body recognized by the U.S. Department of Education (USDE). We are one of its member institutions.
What does "Institutional Accreditation" mean?	It is a comprehensive review that certifies our institution as a whole meets or exceeds established standards for quality, effectiveness, integrity, and sustainability . It is applied to the entire university, not just individual programs.
Why is NWCCU accreditation important to our university?	It is critical for our operations and reputation: 1. Federal Funding: It is the gateway for our students to receive federal financial aid (Title IV funds) and for the university to receive federal grants and research funds. 2. Quality Assurance: It provides external validation of the quality of our educational programs and ensures continuous improvement. 3. Transferability: It ensures our degrees and credits are widely recognized and accepted by other institutions and employers.

What are the main areas NWCCU evaluates?	The standards are typically focused on two broad areas: 1. Student Success and Institutional Mission and Effectiveness: How well we are fulfilling our mission and achieving intended student learning and achievement outcomes. 2. Governance, Resources, and Capacity: The quality of our leadership, financial stability, academic freedom, integrity, and physical/technology infrastructure.
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Part 2: Our University's Accreditation Cycle

Question	Answer
What is the overall length of the NWCCU accreditation cycle?	The standard accreditation cycle for a member institution is seven years, culminating in a comprehensive evaluation and reaffirmation of accreditation.
What are the key reports/visits in the seven-year cycle?	The cycle requires several key reports and peer-review site visits: 1. Year 3: Mid-Cycle Evaluation Report and Site Visit (Focus on assessment planning and institutional effectiveness readiness). 2. Year 6: Policies, Regulations, and Financial Review. 3. Year 7: Evaluation of Institutional Effectiveness (EIE) and Comprehensive Site Visit (Full review of all standards and a self-study report). Also: An Annual Report is submitted every year.

Where are we currently in the seven-year cycle?	We are currently in our second year of the seven-year cycle, following our last full accreditation site visit (the Year 7 Evaluation of Institutional Effectiveness).
What is our next major accreditation milestone?	Our next major event is the Mid-Cycle Evaluation Report and Site Visit next fall (Year 3) .
What is the focus of the Mid-Cycle Review?	The Mid-Cycle Review is a formative, collaborative evaluation. The peer review team will focus on: * Our progress in fulfilling our institutional mission and core themes. * Evidence of student achievement and continuous improvement in all areas. * Our readiness for the Year 7 comprehensive review.
What is the Board's role in this process?	The Board of Trustees plays a vital role in demonstrating Standard Two compliance (Governance, Resources, and Capacity). Specifically, the Board is responsible for: * Ensuring the long-term financial stability and sustainability of the institution. * Upholding institutional integrity and academic freedom . * Approving the mission and core themes, and monitoring the overall effectiveness of the university leadership and operations.

SOU Accreditation Timeline

- New Programs submitted Summer 2025 (annual)
- Annual report submitted 8-1-25
- Ad-Hoc report submitted 9-1-25
 - Feedback from NWCCU expected February or March of 2026
- Mid-Cycle Evaluation Report due 9-1-26
- Mid-Cycle Site Visit Fall 2026



Southern Oregon University

Ad Hoc Report to NWCCU

September 1, 2025

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1. Introduction
2. Progress on Recommendations
 - a. Recommendation 3: Fall 2023 Evaluation of Institutional Effectiveness -
Benchmark their disaggregated student achievement indicators against student achievement indicators from regional and national peer institutions. (2020 Standard(s) 1.D.2).
 - b. Recommendation 4: Fall 2023 Evaluation of Institutional Effectiveness - Use their benchmarked student achievement indicators to inform the creation of student achievement goals for the institution and to pursue continuous improvement efforts in planning, decision making, and allocation of resources to mitigate perceived gaps in achievement and equity. (2020 Standard(s) 1.D.3;1.D.4).
 - c. Recommendation 6: Fall 2023 Evaluation of Institutional Effectiveness - Publish in the catalog, or provide in a manner available to students and other stakeholders, expected student learning outcomes. (2020 Standard(s) 2.G.2;1.C.3).
 - d. Recommendation 7: Fall 2023 Evaluation of Institutional Effectiveness - Create a Regular and Substantive Interaction policy to maintain effective learning environments with appropriate programs and services to support student learning and success. (2020 Standard(s) 2.G.1).
3. Concluding Statement

I. Introduction

Southern Oregon University hosted a site visit for its Evaluation of Institutional Effectiveness in October, 2023, received the verbal report from the team's chair at the end of the visit, and received the Commission Letter reaffirming its accreditation and outlining commendations and recommendations on March 1, 2024. The Commission made four commendations:

1. The work of the General Education Task Force in the planning and development of the new General Education model, which is innovative, thoughtful, and student-centered.
2. Prioritizing student access and success amidst the pandemic, wildfires, financial constraints, and other challenges.
3. Faculty and staff for their resiliency and commitment to the institution and its students.
4. President Bailey for taking bold, transparent action to address financial health and management.

The Commission made five recommendations concerning areas substantially in compliance but in need of improvement:

- Recommendation 1: Fall 2023 Evaluation of Institutional Effectiveness - Demonstrate a continuous process to assess institutional effectiveness, including student learning, student achievement, and support services by creating an ongoing and systematic evaluation and planning process to inform and refine its effectiveness, assign resources, and improve student learning and achievement. (2020 Standard(s) 1.B.1)
- Recommendation 2: Fall 2023 Evaluation of Institutional Effectiveness - Set and articulate meaningful goals, objectives, and indicators of its goals to define mission fulfillment and to improve its effectiveness in the context of and in comparison with regional and national peer institutions. (2020 Standard(s) 1.B.2)
- Recommendation 5: Fall 2023 Evaluation of Institutional Effectiveness - Fully demonstrate that the results of its assessment efforts are systematically used to inform academic and learning-support planning practices to continuously improve student learning outcomes and student support services. (2020 Standard(s) 1.C.5; 1.C.7)
- Recommendation 6: Fall 2023 Evaluation of Institutional Effectiveness - Publish in the catalog, or provides in a manner available to students and other stakeholders, expected student learning outcomes. (2020 Standard(s) 2.G.2; 1.C.3)
- Recommendation 7: Fall 2023 Evaluation of Institutional Effectiveness - Create a Regular and Substantive Interaction policy to maintain effective learning environments with appropriate programs and services to support student learning and success. (2020 Standard(s) 2.G.1)

Finally, the Commission found Southern Oregon University to be out of compliance with NWCCU Standards for Accreditation in two areas and issued two recommendations:

- Recommendation 3: Fall 2023 Evaluation of Institutional Effectiveness - Benchmark their disaggregated student achievement indicators against student achievement indicators from regional and national peer institutions. (2020 Standard(s) 1.D.2)

- Recommendation 4: Fall 2023 Evaluation of Institutional Effectiveness - Use their benchmarked student achievement indicators to inform the creation of student achievement goals for the institution and to pursue continuous improvement efforts in planning, decision making, and allocation of resources to mitigate perceived gaps in achievement and equity. (2020 Standard(s) 1.D.3;1.D.4)

The Commission required that Southern Oregon University provide an Ad Hoc Report in Fall 2025 to address the following recommendations:

- Recommendation 3: Fall 2023 Evaluation of Institutional Effectiveness
- Recommendation 4: Fall 2023 Evaluation of Institutional Effectiveness
- Recommendation 6: Fall 2023 Evaluation of Institutional Effectiveness
- Recommendation 7: Fall 2023 Evaluation of Institutional Effectiveness

This report will describe the actions taken and progress made by Southern Oregon University to address Recommendations 3, 4, 6 and 7 of the Commission's findings from the Evaluation of Institutional Effectiveness.

Our responses to Commission recommendations occur within the context of changes in leadership and the adoption of a new 3-year strategic plan.

Changes in leadership include the re-structuring of university management, retirement of Provost Susan Walsh and the appointment of Dr. Casey Shillam to the position in early 2024, and the departure of Vice President for Academic Support Neil Woolf. As a result of budget constraints, the Academic Support role was added to the Provost's role. The formal title for that role is the Provost and Executive Vice President of Academic and Student Support. In addition, the interim Vice President for Finance and Administration, Peter Angstadt retired and SOU hired Dr. Carson Howell in February of 2025.

The other major factor is the shift to a new 3-year strategic plan at the direction of the Board of Trustees. The new strategic planning process began in Fall 2024. A draft was presented to the Board of Trustees at its June 2025 meeting, with approval expected in October 2025. This process creates an opportunity to align budget and enrollment management efforts with updated goals and Key Performance Indicators consistent with NWCCU Standards.

II. Progress on Recommendations

One of our first steps in responding to the NWCCU recommendations from our Evaluation of Institutional Effectiveness was to develop a shared understanding of the complex system and how to make improvements through participation in The Ecosystem Project designed by consultants Rob Brodnick and Karyn Zuidinga. That project enabled us to create a depiction of the Institutional Effectiveness Ecosystem at SOU and recommended interventions at different levels of complexity to make the system more robust. One suggestion was to “redesign the university assessment committee which is currently focused only on undergraduate programs with one comprehensive committee that focuses on all student learning levels and integrates assessment and institutional effectiveness. This group might also play a role in connecting assessment results with institutional changes and synthesizing lessons learned from assessment across the Academic, Support Services, and Learner Experience communities.”

The project highlighted the perception that, “while faculty and staff are very focused on student success, many supporting processes are not nearly as aligned with that sentiment and many roadblocks remain in place. For example, SOU is challenged with balancing the burden of assessment with the need for the results it produces. We propose that SOU consider work-life balance in the larger SOU Community and identify ways to support faculty and staff as they tend to matters of institutional effectiveness.” These suggestions occur within the context of a broader observation and suggestion, that SOU should work toward developing a culture of institutional effectiveness and integrating strategy with institutional effectiveness.

Our holistic response to the recommendations from our Evaluation of Institutional Effectiveness is guided by our new strategic plan, our Enrollment Management and Recovery working group, and the suggestions and recommendations that emerged from our participation in The Ecosystem Project. While this process may take longer than isolated efforts to respond to the recommendations from the EIE, we believe that a systemic approach will yield more robust changes and lasting results.

Specifics of progress toward implementing Recommendations 3, 4, 6, and 7 follow.

Recommendation 3: Fall 2023 Evaluation of Institutional Effectiveness - Benchmark their disaggregated student achievement indicators against student achievement indicators from regional and national peer institutions. (2020 Standard(s) 1.D.2).

At the time of the Evaluation of Institutional Effectiveness, Southern Oregon University had multiple lists of peer comparators for different purposes, but not a single list against which student achievement indicators were benchmarked and tracked. We began the process of developing a single list by starting with the existing lists, which totaled 37 institutions. The Associate Provost, Director of Institutional Research, and Director of Institutional Effectiveness led the effort. We first compared Fall 2023 IPEDS data on institutional characteristics and achievement indicators, then developed a list based on the most institutional characteristics in common. Initial characteristics were:

- Full-time degree-seeking undergraduate enrollment
- FT undergraduate retention rate
- 6-year graduation rate
- Percentage of students receiving Pell grants
- Percentage of BIPOC students
- Location description

Once we had the data for the initial 37 institutions, the Associate Provost explained the goal and process for establishing peer comparators and sought feedback from stakeholders, including the Board of Trustees, the President's Cabinet and Super Cabinet (an expanded group of leaders from across the university), the Provost's Leadership Council, Faculty Senate, and the Deans, Directors, and Chairs group. The first round of feedback produced suggestions of ten more institutions to compare, and additional indicators such as data on instructional salaries, in-state and out-of-state price, admissions, first and second bachelor's degrees, race and ethnicity, and gender. The second round of comparisons led to a few changes; however, using the relevant Standards for Accreditation kept the team focused on pertinent criteria for establishing peer comparators.

The next step was to narrow down the list to a manageable peer comparators group that will be useful for benchmarking and monitoring our efforts and results. Our focused list consisted of seven institutions: two regional and five national. We also identified three aspirational peers based on their retention and 6-year graduation rates. Another round of presentation, explanation, and feedback seeking resulted in the addition of one more regional peer institution.

By June 2025, we identified undergraduate retention and 6-year graduation as our initial achievement indicators, and these are now public on our [Institutional Effectiveness webpage](#), part of the Institutional Research website. We have started with basic information while we also examine how our peer institutions, especially our regional peers, present student success data on their public-facing websites.

The next step, currently underway, is to explore which other indicators to track. This work brings together the Strategic Enrollment Management Group and institutional effectiveness efforts in alignment with the university's new strategic plan. One indicator under consideration is to evaluate courses with lower success rates (DFWI); we are reviewing data by course over time and will then disaggregate the results and look for potential interventions to mitigate achievement and equity gaps. We have reached out to regional peers seeking to share data in order to more effectively use disaggregated data to mitigate gaps in achievement and equity.

Our two main criteria for choosing and presenting indicators and disaggregated data are first, their utility in helping us improve student achievement and success, and second, their transparency to public audiences. We are taking the necessary time to choose the most important indicators to track, and to develop integrated efforts in order to yield useful results.

Recommendation 4: Fall 2023 Evaluation of Institutional Effectiveness - Use their benchmarked student achievement indicators to inform the creation of student achievement goals for the institution and to pursue continuous improvement efforts in planning, decision making, and allocation of resources to mitigate perceived gaps in achievement and equity. (2020 Standard(s) 1.D.3;1.D.4).

As described above, in the period from the conclusion of the Evaluation of Institutional Effectiveness and receipt of recommendations to the end of the 2024-25 academic year, Southern Oregon University undertook a comprehensive and inclusive process to arrive at a list of peer comparators for the purpose of benchmarking and closing achievement and equity gaps. We have reached out to peer comparators to ask if they would be willing to share their data and methodology. Efforts to create student achievement goals and pursue continuous improvement based on those goals are just beginning, supported by:

- A draft of a new 3-year strategic plan, SOU Thrive, with three key areas: students thriving, teams of employees thriving, and the institution thriving. We are creating Key Performance Indicators and action plans during summer 2025;
- Participation in the Ecosystem Project, a pilot effort to map the “ecosystem” of institutional effectiveness at Southern Oregon University, resulting in recommended interventions for improvement;
- Strategic Enrollment Management efforts, pivoting to “Enrollment Recovery,” with dual foci of increasing enrollment of new students, and retaining and graduating enrolled students.

Situating the work of addressing equity and achievement gaps within the overall strategic plan framework of students, teams, and the institution thriving sets up a systemic perspective from which to analyze and change processes and relationships at all levels, as well as simpler and more self-contained reforms needed to produce targeted improvements. For example, one university-wide goal within our Strategic Enrollment Plan is to improve the student experience in each interaction with university offices, including but not limited to the registrar’s office, advising, and financial aid, as well as their experience navigating their path through their academic programs and reducing institutional barriers to students’ successful completion of their programs and graduation. By understanding and addressing common barriers to success, we can pursue continuous improvement even as we undertake analysis and comparison with our peers to mitigate achievement and equity gaps for groups of students with specific risk factors. The Board of Trustees lauded the draft for our new Strategic Plan goals in June. During the summer 2025, we are adding specific goals and Key Performance Indicators, in anticipation of a formal adoption decision by the Board of Trustees in October 2025.

As mentioned above, we are analyzing DFWI data to look for issues amenable to intervention. We are also analyzing degree complexity across all academic programs, with the goal of streamlining and simplifying, reducing barriers to progress and completion while maintaining academic rigor. And we are evaluating the early implementation of our new General Education model, specifically to identify roadblocks for students, with particular attention to transfer students. While we would like to reach the levels of our aspirational comparators, we are in the process of developing interventions and matching those to the expected results in terms of improvements in retention and graduation rates for specific groups of students, and timelines for reaching those targets.

In addition to analyzing DFWI data and developing interventions where needed, we are also examining degree complexity. That analysis is the first step in an effort to simplify our major curricula and reduce or eliminate curricular or administrative barriers to progress toward degree completion. This does not mean reducing academic rigor or standards but rather looking at points in the curriculum that are common obstacles for students and analyzing how best to address them. In addition, we are undertaking a similar analysis of the new General Education model with an eye towards simplification and identifying roadblocks for students, in particular our transfer student population.

All of these efforts involve starting with a broad examination of curriculum, policies, and the student experience, and then a deeper look at the experiences of specific populations and interventions to address gaps in equity and achievement.

Recommendation 6: Fall 2023 Evaluation of Institutional Effectiveness - Publish in the catalog, or provide in a manner available to students and other stakeholders, expected student learning outcomes. (2020 Standard(s) 2.G.2;1.C.3)

In 2023-24, academic programs were asked to reflect on and consider revising their Program Learning Outcomes in preparation for publishing them in the catalog and/or on program webpages. That request came from the University Assessment Committee, Director of Assessment, and Provost's Office. The University Assessment Committee held a workshop during Winter Quarter 2024 to share best practices for writing program learning outcomes and give programs an opportunity to begin working together on revisions. The workshop drew on the Guiding Questions and Best Practices document produced by the Common Course Numbering (CCN) Outcomes Assessment Subcommittee of the Oregon Higher Education Coordinating Commission. The document was adapted for program level outcomes. The Director of Assessment sits on the state-level committee and a number of SOU faculty participate in CCN committees; the state commission is now considering how best to use that document to guide program level outcome creation for Major Transfer Mapping. Our efforts were in alignment with state-level coordination.

As a result of the workshop, 18 undergraduate degree programs as well as Library Instruction and University Seminar submitted revised PLOs to the University Assessment Committee for review. Reviewers from the University Assessment Committee gave feedback and the Director of University Assessment shared that feedback with department chairs or their designated assessment coordinator. Department chairs or faculty made the final decision about the wording of their PLOs. The Director of University Assessment also worked with approximately a half dozen other undergraduate degree program chairs to develop or revise their PLOs. During Summer 2024, Program Learning Outcomes were compiled for publication in the 2025-26 Catalog, and those were updated as programs created or modified PLOs throughout the 2024-25 academic year. With a few exceptions where two departments offer joint degrees, PLOs for all degree programs are now included in the [Catalog](#).

Recommendation 7: Fall 2023 Evaluation of Institutional Effectiveness - Create a Regular and Substantive Interaction policy to maintain effective learning environments with appropriate programs and services to support student learning and success. (2020 Standard(s) 2.G.1)

We began addressing this recommendation by examining other institutions' policies and practices, and by discussing roles and responsibilities within Southern Oregon University. Within SOU, the discussion was led by the Associate Provost, Director of the Center for the Advancement of Teaching and Learning (CATL), and Director of Institutional Effectiveness. Central themes were the need to keep any policy simple and have it clearly reflect US Department of Education standards without any variation specific to SOU, and the need to distinguish between faculty support and enforcement. The role of CATL is to support faculty, and the Director is careful to guard that role from encroachment by enforcement and compliance activities. The Director and staff of CATL developed a document to assist faculty in creating and teaching online courses to comply with federal regulations concerning Regular and Substantive Interaction. The Associate Provost ensured that statements concerning Regular and Substantive Interaction were added to the [Academic Policies](#) and [Online Programs](#) sections of the Catalog.

In order to maintain CATL's boundary about providing support but not enforcement, the next step was to determine how to ensure compliance with the RSI mandate. That determination was reached after several discussions over the course of the 2024-25 academic year. As of Summer Quarter 2025, CATL will continue to provide guidance and assistance to faculty in all aspects of curriculum and instruction, including how to ensure that they meet federal requirements, while the Director of Institutional Effectiveness will check a random sample of online course sites for compliance with DOE requirements on Regular and Substantive Interaction.

The efforts of CATL to guide and assist faculty in meeting federal requirements concerning online courses include development of a [Distance Education Federal Requirements Checklist](#) in the form of a template that faculty can generate for their specific use. CATL is exploring the creation of a self-guided module to help faculty become familiar with the checklist as well as an online course quality audit as a limited service, based on standards like Quality Matters.

III. Concluding Statement

Since 2023, Southern Oregon University has undertaken a focused, inclusive effort to address the NWCCU recommendations that resulted from the Evaluation of Institutional Effectiveness. Our efforts to address accreditation standards and recommendations occur within the context of leadership changes, ongoing and worsening financial constraints and uncertainty, and the development of a new strategic plan. While we have specifically addressed the recommendations to be considered in this Ad Hoc Report, they are connected to our efforts to address all the recommendations that resulted from the EIE, and our continuous improvement efforts based on direction from the University's Board of Trustees and Cabinet. We anticipate that a systemic approach will yield lasting changes and results, and we look forward to feedback and further direction from NWCCU in our common pursuit of quality higher education.

Significant Student Account Balances

Significant Student Account Balances

Dr. Carson Howell, SOU, Vice President for Finance and Administration
Stephanie Hanigan, SOU, Associate Director for Business Services & Bursar

Agenda

- History of Student Account Balances
- Trends
- Influential Factors on Student Account Balances
- Efforts to Mitigate
- Questions?

History of Student Account Balances

Over the past 10 years, the significant balance threshold has varied from \$1,500 at the lowest to \$12,000 at the highest.

During the COVID-19 pandemic, key administrators made the decision to cease collection efforts including a pause in the assessment of interest and penalties and the use of registration barring Accounts Receivable holds.

Interest and penalties were re-engaged in Winter of 2022, as well as A/R registration holds impacting Spring 2022 registration efforts.

As of October 1, 2025:

<u>Count</u>	<u>Over 5 Years</u>	<u>4-5 Years</u>	<u>3-4 Years</u>	<u>2-3 Years</u>	<u>1-2 Years</u>	<u>0-1 Year</u>	<u>Balance</u>
4,329	\$836,424.31	\$1,506,095.44	\$2,043,095.77	\$2,910,804.89	\$2,884,159.71	\$9,829,929.29	\$20,010,509.41

Aging student account balances are isolated by statuses: Bankruptcy, Collection Agencies, Deceased, Internal Collections, No Delinquency Code, Payment Plan, or Write-Off

Trends

Aging student account balances have been recorded since July of 2019.

Since then, the Outstanding Student Balance averages by Fiscal Year:

Fiscal Year	Number of Students	Average Balance	Total Accounts Receivable	
20	3966	\$2,611	\$9,767,877	
21	3693	\$3,168	\$11,700,366	↑
22	3708	\$3,746	\$13,889,131	↑
23	3915	\$4,515	\$17,678,054	↑
24	3886	\$5,156	\$20,035,335	↑
25	3674	\$4,780	\$17,563,237	↓
Between FY24 and FY25:				
	-5.46%	-7.29%	-12.34%	

Influential Factors on Student Account Balances

- A lack of financial literacy
 - Students have been unaware of what financial aid is available to them (including grants, scholarships, and loans) and oftentimes miss the deadline to apply
 - Too often, students have not been adequately prepared for the costs of their education
 - Some students may not be aware of the impact of educational versus financial decisions
- Timing between charge assessment versus financial aid disbursements
 - For example, Fall Term charges assess early September but financial aid disbursements do not occur until late September
- Underutilization of available aid
 - Students are resistant to borrowing student loans and have preferred to owe a balance to the university instead of a federal lender
 - Many students who are offered Federal Work Study do not understand how the program functions or how to identify an eligible Federal Work Study position

(continued)

Influential Factors on Student Account Balances

- Oregon Senate Bill 424
 - Effective July 1, 2024
 - “Prohibits post-secondary institutions of education that are based on Oregon from refusing to provide transcript to current or former student because student owed debt to institution.”

- Communication challenges
 - Difficulty establishing consistent engagement with students
 - Conflicting messages from campus staff to students causing confusion
 - Uncertainty regarding whom to contact with questions or requests for support

Efforts to Mitigate

- Financial Literacy for Incoming Students
 - Phase 1 = SOU Paying for University Worksheet
 - Phase 2 = Account Review and Payment Plan Options
 - Phase 3 = Establishing an Active Payment Plan
- Use of Internal Collections Hold to prompt establishment of an active payment plan
 - This means even accounts that are below the applicable balance threshold may still have a registration hold if an active payment plan with a minimum of three consecutive and timely payments is not present
- Increased outreach
 - Use of Navigate text as a method of communication
 - Reduction of manual emails sent (inbox oversaturation)

Efforts to Mitigate

- A Significant Balance Hold text was sent via Navigate to 1,911 students who had a balance due on their account on October 7th

Heads up, Raiders! Significant Balance Holds start Mon, Oct 13. Questions or need help? Click here for more info:
<https://sou.edu/student-services/accounts/holds/#significant-balance>

- There were a notable number of accounts that were paid in full by October 13th
 - Prior to the Fall 2025 Significant Balance Hold being applied on October 13th, there were 44 currently enrolled students with a Significant Balance Hold
 - After the Fall 2025 Significant Balance Hold was applied and accounts reviewed, 945 accounts have the hold present
- Reduced Significant Balance Thresholds
 - Students enrolled prior to 2024-2025 Academic Year = \$6,000 threshold expectation
 - Students enrolled 2024-2025 Academic Year = \$3,000 threshold expectation
 - Students enrolled 2025-2026 Academic Year = \$0 threshold expectation
 - \$0 threshold expectation aligns with the policies of other Oregon public universities

(continued)

Efforts to Mitigate

– Significant Balance Exception Review Form

- When a student cannot fund the account below the applicable threshold, Bursar staff submit an exception request to the Bursar and Assistant Bursar on the student's behalf
- In order for an exception to a hold to be extended, the following parameters must be in place:
 - 1) An active payment plan established with a member of the Student Balances or Student Accounts team
 - 2) Valid financial aid eligibility and all aid accepted, requirements met, and not in Satisfactory Academic Progress or financial aid denied status
 - 3) Future financial aid completed and all aid accepted, requirements met, and not in Satisfactory Academic Progress or financial aid denied status
 - 4) Satisfactory Academic Progress is being met
- The student is informed of the decision within 48 business hours

*Academic Year 2024-2025: 138 exceptions submitted, 86 approved (~62.32%), 20 denied (~14.49%), 30 required student action (~21.74%), and 1 student paid in full (~.73%)

Efforts to Mitigate

- Increased collaboration with campus partners
 - Dean of Students Office
 - Financial Aid Office
 - University Housing
 - Registrar's Office
 - Athletics
 - Raider Student Services
 - Oregon Health & Science University

Questions?



Student Core Information System Replacement (CISR) Project Report

Workday Student Update



Board of Trustees 10/16/25⁸⁷

Anticipated Transition Timeline



Fall 2025



Phase 1 Shift Admissions

Begin taking applications for Fall 2026 in Workday

Includes:

- Programs of study
- Catalog
- Academic calendars
- Financial Aid for new students Fall 2026

Spring 2026

Phase 2 Shift Academics

Manage registration for Fall 2026 courses
(🛎 *Spring and Summer will still occur in Banner 🛎*)

Includes:

- Academic records
- Advising
- Registration
- Overrides

Summer 2026

Phase 3 Shift Billing

Manage accounting for Fall 2026
(🛎 *Spring and Summer will still occur in Banner 🛎*)

Includes:

- Billing
- Payments
- All accounting for Fall 2026

Fall 2026

Phase 4 Go Live!

Workday becomes single source of truth for all student data

Includes:

- Grades
- Refunds
- Transcripts
- Graduation

Support Timing



Resource Development & Refinement

- **User Readiness Review:** Refine support resources — December 2025
- **Mock Term:** Workday “dress rehearsal” — January 2026

Orientation — *“Catch them when they care.”*

- **Faculty/Staff:** Winter 2026 for Fall 2026 registration
- **Students:** Spring 2026 for Fall 2026 registration

CISR

About

Learn Workday

CISR Connect

FAQ

Sneak Peeks

☆ Focus
on Staff

☆ Focus
on Faculty

☆ Focus on
Admissions

☆ Focus on
Student
Onboarding



sou.edu/cisr

Workday Highlights

☆ Meet the
Team

♡ Workday
Wins

📖 Workday
Terms

End-to-End Testing by the Numbers!



Story Steps

75



Average number of **steps** in each "story" describing a student's multi-year trajectory from applicant to graduate

Students

140



Personas represent a full range of **student** populations to ensure everything works as expected

Activities

10,500



All together, 10,500 testing **activities** will be completed in SOU's 14 weeks of End-to-End testing

The Workday Team



 Ryan Allen 
Nate Allison
Jeff Anderson 
Jayne Atkins
Racquel Berglund
Justin Bezuhly 
Nicole Blodgett
Karen Bolda 
Gordon Carrier 
 Tina Cripe
Tracey Culbertson

Lisa Denney 
Ryan Fisher 
Angelyn Gay
Stephanie Hanigan 
Julie Hugues
Justin Irwin 
Joe Jackson 
Stephen Lanning 
Alana Lardizabal
Marisa Martes 


Paul Martinez 
Julie McClendon
Sean Monaghan 
Matthew Moreali 
Mame Niang
Zac Olson 
Ian Parent
Mary Patridge 
Noel Porter
Erica Riggs 

Tom Rutledge 
Tabetha Savage 
Dallas Smith
John Stevenson
Miranda Stiles 
Karen Stone
Jessica Valenzuela 
Carrie Vath
Andrew Webb 
Eric Wilhite

2026-2027 Committee Schedule and Future Meetings (Action)

SOU Board of Trustees 2026-2027 Board and Committee Meeting Schedule				
MEETING	Academic and Student Affairs	Finance and Administration	Executive, Audit, and Governance	Board of Trustees
DAY	Third Thursdays (Unless Otherwise Indicated)	Third Thursdays (Unless Otherwise Indicated)	Third Fridays (Unless Otherwise Indicated)	Third Fridays (Unless Otherwise Indicated)
FREQUENCY	Four Times Per Year	Six Times Per Year	Four Times Per Year	Five Times Per Year
TIME	1:00- 4:00 p.m.	5:00-7:00 p.m.	9:30-11:30 a.m.	12:00-5:00 p.m.
	January 15, 2026	January 15, 2026	January 16, 2026	January 16, 2026
		March 19, 2026		
	April 16, 2026	April 16, 2026	April 17, 2026	April 17, 2026
		May 21, 2026		
	June 17, 2026*±	June 17, 2026*±	June 18, 2026*±	June 18, 2026*±
				Retreat September 17, 2026 September 18, 2026 All Day, Time TBD
	October 15, 2026	October 15, 2026	October 16, 2026	October 16, 2026
	January 21, 2027	January 21, 2027	January 22, 2027	January 22, 2027
		March 18, 2027		
	April 15, 2027	April 15, 2027	April 16, 2027	April 16, 2027
		May 20, 2027		
	June 16, 2027±	June 16, 2027±	June 17, 2027±	June 17, 2027±
				Retreat September 16, 2027 September 17, 2027 All Day, Time TBD
	October 21, 2027	October 21, 2027	October 22, 2027	October 22, 2027

* Occurs during the week following Commencement

± In observance of the Juneteenth holiday, June 2026 and 2027 meetings will occur on Wednesday and Thursday instead of Thursday and Friday

Adjournment