

## Public Meeting Notice

January 9, 2026

TO: Southern Oregon University Board of Trustees

FROM: Sabrina Prud'homme, University Board Secretary

RE: Notice of Regular Meeting of the Board of Trustees

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

Topics of the meeting will include reports from the board's Academic and Student Affairs, Finance and Administration, and Executive, Audit, and Governance Committees; the Associated Students, Faculty Senate, and Staff Assembly of Southern Oregon University; the University President; the administrative units of University Advancement; Equity, Diversity, and Inclusion, Athletics, and Government Relations.

There are two action items on the agenda: the use of proceeds from the sale of SOU properties; and an updated Internal Audit Charter.

The board will also discuss updates from the Higher Education Coordinating Commission and updates on the SOU Strategic Plan. Other information and discussion items include the enrollment landscape; actions for enrollment impact; a review of SOU employee demographics and other data; and the results of SOU's campus climate survey.

The meeting will occur as follows:

Friday, January 16, 2026

12:00 p.m. to 5:00 p.m. (or until business concludes)

Visit [governance.sou.edu](https://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/89549886417> at the time of the meeting.

**If accommodations for persons with disabilities are required, please contact Holly Frazier at (541) 552-8055 or email [trustees@sou.edu](mailto:trustees@sou.edu). Accommodation requests should be made at least 48 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 commenters may sign up to speak or submit written comments via email to the Board of Trustees at [trustees@sou.edu](mailto:trustees@sou.edu). To sign up by phone, commenters may also contact the Office of the Board of Trustees at (541) 552-8055 and provide their name, email address, phone number, relationship to SOU, and the subject of their public comments. Written public comments also may be delivered by hand or mailed to the SOU Board of Trustees, 1250 Siskiyou Boulevard, Churchill Hall, Room 107, Ashland, OR 97520.



**Board of Trustees Meeting**  
**January 16, 2026**



# SOU Land Acknowledgment



# Call to Order / Roll / Declaration of a Quorum

# **SOU History Moment: A Story of Resilience**



## Board of Trustees Meeting

Friday, January 16, 2026

12:00 – 5:00 p.m. (or until business concludes)

Meese Room, Hannon Library, SOU Campus

Zoom: <https://sou.zoom.us/j/89549886417>

Persons wishing to provide live public comments in the meeting or in writing may sign up at [trustees@sou.edu](mailto:trustees@sou.edu).  
Please note: times listed are approximate and items may be taken out of order.

- |            |          |   |  |
|------------|----------|---|--|
| 12:00 p.m. | <b>1</b> | <b>Call to Order/Roll/Declaration of a Quorum</b>                                   |  |
|            | 1.1      | Welcome and Opening Remarks   | Chair Sheila Clough  |
|            | 1.2      | SOU Land Acknowledgment   | Trustee Rose Harwood   |
|            | 1.3      | Roll Call and Declaration of a Quorum   | Sabrina Prud'homme, SOU,<br>Board Secretary  |
|            | 1.4      | SOU History Moment: A Story of Resilience   | Peter Finkle, Walk Ashland   |
|            | 1.5      | Agenda Review   | Chair Sheila Clough  |
| 12:10      | <b>2</b> | <b>Public Comment</b>   |  |
|            | 2.1      | Invited Public Comment: Associated Professors<br>of Southern Oregon University      | Dr. Melissa Anderson, APSOU,<br>President  |
|            | 2.2      | Invited Public Comment: SOU Service<br>Employees International Union (Sub-local 84) | Sage TeBeest, SEIU, President  |
|            | <b>3</b> | <b>Shared Governance Reports</b>  |  |
| 12:20      | 3.1      | Associated Students of Southern Oregon<br>University Report                         | Sophia Smith, ASSOU,<br>President  |
| 12:25      | 3.2      | SOU Faculty Senate Report   | Dennis Slattery, SOU, Faculty<br>Senate Chair  |
| 12:30      | 3.3      | SOU Staff Assembly Report   | Stephanie Hanigan, SOU, Staff<br>Assembly Chair  |
| 12: 35     | <b>4</b> | <b>President's and Administration Reports</b>                                       |  |
|            | 4.1      | President's Report  | President Rick Bailey  |
|            | 4.1.1    | University Advancement Report   | Janet Fratella, SOU, Vice<br>President for University<br>Advancement and Executive<br>Director, SOU Foundation |

**Board of Trustees Meeting  
Friday, January 16, 2026  
12:00 – 5:00 p.m. (or until business concludes)**

**AGENDA (Continued)**

	4.1.2	Equity, Diversity, and Inclusion Report	Jonathan Chavez Baez, SOU, Director of Belonging & Engagement
	4.1.3	SOU Athletics Report	Matt Sayre, SOU, Director of Athletics
	4.1.4	Government Relations Report	Marc Overbeck, SOU, Director, Government Relations
	<b>5</b>	<b>Academic and Student Affairs Committee Report</b>	
1:00	5.1	General Committee Report	Trustee Brent Barry
	<b>6</b>	<b>Finance and Administration Committee Report</b>	
1:10	6.1	General Committee Report	Trustee Liz Shelby
1:20	6.2	Use of Proceeds from the Sale of SOU Properties (Action)	
	<b>7</b>	<b>Executive, Audit, and Governance Committee Report</b>	
1:30	7.1	General Committee Report	Chair Sheila Clough
1:40	7.2	Updated Internal Audit Charter (Action)	Chair Sheila Clough; Ryan Schnobrich, PSU, Internal Audit Contractor
1:50		<b>BREAK</b>	
	<b>8</b>	<b>Other Action, Information, and Discussion Items</b>	
2:00	8.1	Higher Education Coordinating Commission Update	Ben Cannon, HECC, Executive Director

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**AGENDA (Continued)**

2:50	8.2	The Enrollment Landscape	Dr. Casey Shillam, SOU, Provost and Executive Vice President for Academic and Student Affairs; Dr. Carrie Vath, SOU, Assistant Vice President of Student Life and Dean of Students; Zac Olson, SOU, Assistant Vice President of Enrollment Services
3:25	8.3	Now, Next, Later: Actions for Enrollment Impact	President Rick Bailey; Dr. Casey Shillam
3:40	<b>BREAK</b>		
3:50	8.4	Strategic Plan Updates	President Rick Bailey
4:05	8.5	Review of Employee Demographics and Data	Alana Lardizabal, SOU, Director, Human Resources
4:20		8.5.1 SOU Campus Culture Survey Results	President Rick Bailey; Sarah Olejniczak, Grand River Solutions, SOU Interim Director of Equity Grievance/Title IX Coordinator
4:45	8.6	Future Meetings	Chair Sheila Clough
4:50 p.m.	<b>9</b>	Adjournment	Chair Sheila Clough

# Public Comment

Invited Commenters:

- Associated Professors of Southern Oregon University (APSOU)
- SOU Service Employees International Union (SEIU Sub-local 84)

# Shared Governance Reports:

- Associated Students of Southern Oregon University (ASSOU)
- SOU Faculty Senate Report
- SOU Staff Assembly

# President's and Administration Reports





# **CELEBRATING 154 YEARS**

# **PRESIDENT'S REPORT TO THE BOARD OF TRUSTEES**

President Rick Bailey  
January 2026





# TEAM REPORT DISCUSSION TOPICS



- **Advancement**
  - \$7.1M raised Jul-Dec 2025 (50% of year goal)
  - Public Campaign Announcement Fall 2026
  - Website Transition in Progress
- **Equity, Diversity and Inclusion**
  - Vulnerabilities and Risks
  - Employee Feedback from Grand River Solutions Survey



# TEAM REPORT DISCUSSION TOPICS



- **General Counsel and Special Projects**
  - Property Sales Update
  - Update on Older Adult Residence Facility
- **Government Relations**
  - State Budget Challenges (Revenue Forecast in two weeks)
  - PERS 2027 Challenges
  - Upcoming Short Legislative Session (Feb-Mar)
- **Athletics**
  - Ribbon Cutting for New Softball Park – Feb 28
  - Roster Size and Fiscal Planning





# **QUESTIONS AND DIALOGUE**

**Thank You!**

## University Advancement Update

January 2026

### OUR MISSION

University Advancement forges lifelong relationships, inspires philanthropy, and stewards resources to foster excellence within its community.

### OUR VISION

University Advancement will inspire a community connected by a shared love of Southern Oregon University.

### ALUMNI RELATIONS

- Under the leadership of new SOU Alumni Association President Sarah Heiken '01, the organization is embarking on a new strategic plan to be completed in June 2026.
- The AR team will launch a student-alumni mentorship program in spring 2026 using its existing Raider Network platform.
- The team is increasing the number of alumni events throughout the state, beginning with several small events in the Rogue Valley and will increase during the coming year. The ongoing Raider Rendezvous events also will continue.

### OSHER LIFELONG LEARNING INSTITUTE

- OLLI volunteer instructors will offer 130 courses in winter term and another 145 in spring term. These are record numbers for the organization, whose membership is currently in excess of 1,700 individuals.
- The organization also has a new partnership with Talent Maker City as well as an ongoing partnership with the Rogue Valley Manor.
- OLLI volunteers will produce and star in a variety show in March 2026 called "OLLI, OLLI, Oxen Free" to be held on the SOU campus. This will be a fundraising event for the organization.

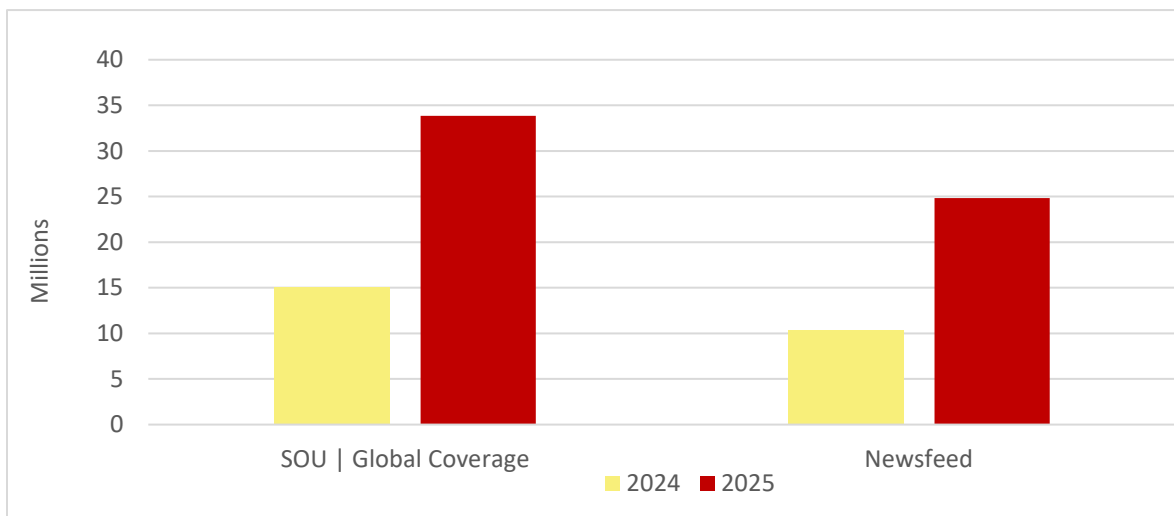
### DEVELOPMENT

- Through mid-December, the SOU development team has raised \$6.8 million toward a goal of \$14 million. The public launch of the campaign is scheduled for Oct. 21, 2026.

### MARKETING AND COMMUNICATIONS

- The rebuild of the SOU website continues apace; a campus show-and-tell will be scheduled in January before copy/text begins being imported. The project is on target to launch in fall 2026.
- SOU will also conduct a branding "refresh" in early 2026 under the guidance of iFactory. SOU has a brand, and this work will help ensure all on campus are unified when communicating about the university.

- Coverage of SOU during the 2025 calendar year increased 83% over the same period in 2024. That averages to about 6.7 mentions of the university each day. The most prominent news stories included coverage in the *New York Times* on Aug. 13, 2025, about how colleges are addressing financial issues—SOU was mentioned prominently.
- Free mentions of SOU in the news media are the result of casual mentions about the university and also those stories that have been “tagged” for their relevance. The following chart shows a financial value of these stories using an advertising rate of \$.37/column inch. One positive note: NewsBreak, an online wire service, began receiving and regularly distributing our SOU news releases this year; that service has an average potential reach of 17 million, which is significantly affecting the overall penetration of our stories.



### SPONSORED PROGRAMS

- SOU has been awarded \$3.2 million in grants since July 1, 2025. Among the largest is from the Department of Early Learning and Care; SOU is the lead awardee.
- Biologist Karen Mager was awarded \$40,000 in September 2025 from the Oregon Wildlife Foundation to support ongoing wildlife monitoring via camera trap at the site of the proposed Southern Oregon Wildlife Crossing over I-5. An additional \$7,000 was added to the grant in December. The grant provides funding for wildlife monitoring through December 2027.
- The Sponsored Programs Office received an NIH Seed Grant of \$50,000 to support the office in ongoing implementation of the Workday grants module to create efficiencies for post-award management.



## Office for EDI Final Report

January 2026

### Program Assessment

In the 2024-2025 academic year, a total of 24 programs and activities were implemented, reflecting a strong commitment to fostering an inclusive campus and sense of belonging. This year's assessment indicates that 86% of the objectives were successfully met, demonstrating both effectiveness and alignment with institutional goals.

These efforts were made possible through strategic collaborations with a range of campus partners, including academic departments, the Social Justice and Equity Committee (SJEC), student clubs, and athletics. These partnerships played a crucial role in expanding the reach and impact of EDI initiatives throughout the university.

#### 24 Total Programs/Activities

- Historical | 4
- Cultural/Arts/Music | 5
- Academic | 5
- Graduate Celebrations | 2
- Trainings | 1
- Meetings/Open House | 3
- Athletics | 1
- Other | 3

### Campus Culture Survey

In May of 2025, the EDI Campus Culture Survey was launched and distributed to both students and employees. Administered by Grand River Solutions, the survey aimed to provide critical insights that inform ongoing efforts to strengthen equity, inclusion, and overall campus climate. The survey focused on campus culture and connectedness, the prevalence of discrimination, reporting procedures, and knowledge of policies and resources.

Survey results were received on October 1, 2025. We will begin the analysis process and plan to provide a comprehensive overview at the next Board of Trustees meeting.



## Quick Facts

- . Students
  - o Response Rate: 11%
  - o BIPOC students reported a lower sense of belonging than White students
  - o 12% of students agreed or strongly agreed that it is common for school leaders to make insensitive or inappropriate comments.
  - o 22% of students who experienced discrimination or harassment said they had difficulty in classes or dropped a class
- . Employees
  - o Response Rate: 51%
  - o 80% of employees indicated that they experienced discrimination, harassment, and/or mistreatment at least once
  - o 55% reported that the incident impacted their career or work environment
  - o TGQN employees reported the lowest sense of belonging on campus
  - o 18% of employees agreed or strongly agreed that it is common for fellow employees to make insensitive or inappropriate comments.

## Native Initiatives & Efforts

Our Office for Native Nation Affairs, led by Kenwani Kravitz, will continue efforts to develop and foster relationships on and off campus. Part of her efforts will include visits to Tribes, community events, and other engagements focusing on our Native American community. This Fall, the Native Nations Gathering House (NNGH) officially opened.

The Native Nations Gathering House (NNGH) at Southern Oregon University (SOU) is a dedicated space that honors the academic achievements, cultural heritage, and distinct identities of American Indian and Alaska Native students, faculty, staff, and tribal communities.

The NNGH serves as both a cultural sanctuary and a center for academic and social empowerment. Rooted in Indigenous values, it elevates Native leadership and ensures that Native voices guide educational and community initiatives. Through programs that integrate traditional knowledge, support cultural preservation, and promote shared





governance, the NNGH strengthens tribal self-determination and empowers tribal communities to shape their own futures.

This initiative reflects SOU's commitment to tribal sovereignty, resilience, and respectful partnership.

### **Organizational Update**

Faced with the current financial challenges at SOU, several areas across campus were impacted, including the difficult decision to eliminate the Office for Equity, Diversity, and Inclusion. However, Jonathan will continue this important work in a different capacity, serving as the Director of Student Belonging and Engagement.

In this role, he will provide leadership, supervision, and vision for student identity-based programming, cultural celebrations, and student clubs and organizations, while further enhancing student belonging and fostering a welcoming and inclusive campus climate.

The closure of the Office for Equity, Diversity, and Inclusion (EDI) at SOU may present the following risks:

- **Reputational Harm:** May be perceived as a retreat from university values and commitment to equity, thereby damaging trust with students, staff, K-12 partners, and the broader community.
- **Campus Climate Decline:** The loss of centralized support can harm feelings of belonging and engagement, especially for underrepresented groups.
- **Recruitment & Retention Challenges:** A perceived lack of support may deter prospective students and faculty and increase turnover.
- **Loss of Expertise:** Specialized knowledge and long-term EDI initiatives may be lost, reducing institutional capacity.
- **Weakened Data & Accountability:** Without a strategic focus on EDI data collection, informed decision-making can be impacted.
- **Strained Partnerships:** Community and funding relationships built through the Office for EDI may be disrupted.



- Operational Burdens: Other staff may be required to undertake complex EDI work without adequate resources and support.
- Invisibility of Equity Gaps: Without oversight, disparities may go unrecognized and unaddressed.

2024-25 EDI Programming Assessment														
PROGRAM/ACTIVITY	Description	Frequency	Date	Total Programs	Target Population	Target Participation	Actual Participation	Goal	Objective 1	Objective 1 Met?	Objective 2	Objective 2 Met?	Objective 3	Objective 3 Met?
CED Meetings	Group of students, administrators, staff and faculty members that provide consultation, recommendations, and guidance on how to implement EDI efforts, policies and campus practices.	Monthly	Various	5	CED Members	25	~18	Demonstrates a commitment to the values and to advancing Equity, Diversity, and Inclusion goals at Southern Oregon University	Provide guidance, and recommendations to advance EDI priorities	Yes	Actively engage in EDI programming and efforts	Yes		
MOSAIC	Employee-driven support system designed to foster a sense of community, connection, and empowerment within the workplace.	Quarterly	Various	2	SOU Employees		65	Create Space for community, nourishment and dialogue for SOU employees to share resources, network and collaboration.	Expand our EDI-competency skills, and bridge the gap of understanding	Partially	Build partnerships and collaborative efforts across campus	Yes	Participate in a Day of Service	No
EDI Newsletter		Quarterly	Various	0/0	Campus	All Campus	N/A	Foster a sense of connection and community by engaging the SOU campus with interesting and interactive content, events, and educational resources	Highlight achievements, success stories, or milestones	No	Highlight upcoming events, programs, or opportunities to encourage participation and involvement	No		
Indigenous Peoples' Day Commemoration	A day to honor and celebrate the diverse cultures, histories, and contributions of Indigenous peoples.	Fall	14-Oct-24	1	Campus	20	30	Raise awareness about the ongoing struggles faced by Indigenous peoples, promote cultural understanding and respect, and acknowledge the historical and contemporary injustices they have faced.	Acknowledge the rich history, culture, and contributions of Indigenous peoples. This includes honoring their traditions, languages, and achievements. Celebrate Indigenous cultures, traditions, and contributions to society	Yes	Provide a platform for Indigenous peoples to share their stories and perspectives.	Yes	Foster relationships between Indigenous and non-Indigenous communities, encouraging mutual respect and understanding.	Yes
EDI Open House	Fall term event that invites the campus community to explore and learn about the initiatives, resources, and programs aimed at promoting EDI.	Fall	14-Oct-24	1	Campus	35	~50	Welcome members of the SOU campus community to engage and learn about the EDI efforts at SOU.	Expand our EDI visibility to campus.	Yes	Build partnerships and collaborative efforts across campus	Yes		
Hispanic Heritage Month Soccer Games Celebration	Honor and celebrate the cultures, histories, and contributions of underserved communities through a variety of activities, performances, discussions, and educational programs	Fall	19-Oct-24	1	Campus	300	450	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	Yes
Indigenous Peoples' Day	A day to honor the cultures, histories, and contributions of Indigenous communities, while raising awareness of their ongoing struggles and the impacts of colonization. It encourages reflection, justice, and reconciliation.	Fall	Oct 19 & 20, 2024	1	Campus	150	400	Raise awareness about the ongoing struggles faced by Indigenous peoples, promote cultural understanding and respect, and acknowledge the historical and contemporary injustices they have faced.	Acknowledge the rich history, culture, and contributions of Indigenous peoples. This includes honoring their traditions, languages, and achievements. Celebrate Indigenous cultures, traditions, and contributions to society	Yes	Provide a platform for Indigenous peoples to share their stories and perspectives.	Yes	Foster relationships between Indigenous and non-Indigenous communities, encouraging mutual respect and understanding.	Yes
Hispanic Heritage Month An Evening with Son de Cuba	Honor and celebrate the cultures, histories, and contributions of underserved communities through a variety of activities, performances, discussions, and educational programs	Fall	25-Oct-24	1	Campus	125	100	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	Yes
Voices of Democracy	This series is designed to provide participants with insights into the significance of Freedom of Speech in Conflict Resolution, Civil Discourse, and Emotional Competency. Our intended impact is that attendees will gain a better understanding of how to foster constructive dialogue in a highly polarized environment.	Fall	Oct 28-30, 2024	3	Campus		40	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	
Dr. Martin Luther King Jr. Day Celebration	Community-wide celebration honoring MLK	Yearly	1.15.2025	1	SO Community	500	500	Honor and celebrate the legacy of Dr. Martin Luther King Jr., a key leader in the American civil rights movement.	Reflect on and advance the principles Dr. King championed, such as equality, justice, and nonviolence.	Yes	Encourage dialogue and action that foster unity among diverse communities, helping to build bridges and address issues of racial and social division.	Yes	Educate people about the civil rights movement, Dr. King's life, and the broader context of racial and social justice.	Yes

2024-25 EDI Programming Assessment														
PROGRAM/ACTIVITY	Description	Frequency	Date	Total Programs	Target Population	Target Participation	Actual Participation	Goal	Objective 1	Objective 1 Met?	Objective 2	Objective 2 Met?	Objective 3	Objective 3 Met?
De-escalation Training	Offer tools to effectively manage and reduce conflict in high-stress situations, preventing escalation to violence or aggression.	Yearly		1	SOU Employees	35	25	Empower individuals with the tools to safely defuse challenging situations and prevent conflicts from escalating.	Teach participants to recognize early warning signs of agitation or distress in individuals	Yes	Provide participants with verbal and non-verbal communication strategies to establish rapport, convey empathy, and calm individuals.	Yes	Provide participants Principles of De-Escalation	Yes
Thundering Moccasins	Native American performing arts group that takes pride in their native heritage by honoring and sharing their culture on the stage or in the classroom through songs and dances.	N/A	10-Apr-25	1	SOU Campus	30	~45	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	Yes
Las Guaracheras Workshop	Celebrate Women, Culture, and Music with Las Guaracheras! This all-women salsa sextet from Cali, Colombia, shares their vision of "strength, unity, love, sisterhood, and music" in each performance. Their cultural and artistic objective is to uplift the female voice within Afro-Latin music and build a more inclusive, diverse, and respectful cultural space for all. Their music celebrates joy, memory, and transformation through an exciting show that will make you want to dance and sing along.	N/A	30-Apr	1	SOU Campus	30	45	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	Yes
Las Guaracheras Concert	Celebrate Women, Culture, and Music with Las Guaracheras! This all-women salsa sextet from Cali, Colombia, shares their vision of "strength, unity, love, sisterhood, and music" in each performance. Their cultural and artistic objective is to uplift the female voice within Afro-Latin music and build a more inclusive, diverse, and respectful cultural space for all. Their music celebrates joy, memory, and transformation through an exciting show that will make you want to dance and sing along.	N/A	30-Apr	1	SO Community	200	150	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	Yes
Las Guaracheras Special Performance for Kindergarten & First Grade students from local bilingual schools	Celebrate Women, Culture, and Music with Las Guaracheras! This all-women salsa sextet from Cali, Colombia, shares their vision of "strength, unity, love, sisterhood, and music" in each performance. Their cultural and artistic objective is to uplift the female voice within Afro-Latin music and build a more inclusive, diverse, and respectful cultural space for all. Their music celebrates joy, memory, and transformation through an exciting show that will make you want to dance and sing along.	N/A	1-May-25	1	Local Kinder Gaden & First Grade students	225	250	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	N/A
Campus Culture Survey	Confidential survey designed to gather insights about experiences and perceptions, and campus culture at SOU.	Every 3 years	May 12-20, 2025	1	SOU Students & Employees	Students: 20% Employees: 55%	Students: 11% Employees: 51%	Understand the current campus climate, and identify ways to foster a more inclusive, equitable, and respectful community for everyone at SOU.	Measure specific areas of campus to include: campus culture and connectedness, prevalence of discrimination, reporting procedures, and knowledge of policies and resources	Yes	Meet or improve campus survey participation.	Partially		

2024-25 EDI Programming Assessment														
PROGRAM/ACTIVITY	Description	Frequency	Date	Total Programs	Target Population	Target Participation	Actual Participation	Goal	Objective 1	Objective 1 Met?	Objective 2	Objective 2 Met?	Objective 3	Objective 3 Met?
Dr. David Palaita	“VASA (Ocean): The Space that is Sacred--An Interdisciplinary & Decolonial Framework for Critical Pacific Islands & Oceania Studies,” explores the power of Pasefika/Oceania languages in a place like higher education. The talk shares the story of City College of San Francisco students and their movement to create a new academic major, highlighting the importance of Pasefika knowledge in the world of education, in our schools, and in our classrooms. This talk is dedicated to all our students of Oceania!	N/A	14-May-25	1	SOU Campus	45	22	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	Yes
Voice of Democracy	This series is designed to provide participants with insights into the significance of Freedom of Speech in Conflict Resolution, Civil Discourse, and Emotional Competency. Our intended impact is that attendees will gain a better understanding of how to foster constructive dialogue in a highly polarized environment.	N/A	14-May-25	1	SOU Campus	45	22	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	Yes
Dr. Sami Schalk	Dr. Schalk's interdisciplinary research focuses broadly on disability, race, and gender in contemporary American literature and culture.	N/A	22-May-25	1	SOU Campus	25	40	Offer a series of campus programs/activities designed to honor the backgrounds, experiences, and perspectives of our campus through speaker events, workshops, performances, and discussions.	Design and implement campus-wide programs/activities that honor and reflect the diverse backgrounds, experiences, and perspectives of the university community.	Yes	Foster ongoing opportunities for education, dialogue, and engagement that deepen understanding of diverse identities and promote cultural competence across campus.	Yes	Cultivate a campus climate where students, staff, and faculty are empowered to fully embrace and express their identities through supportive, community-building initiatives that reinforce a sense of belonging and institutional commitment to inclusion.	Yes
SOU Food Truck Day	A day to thank students and employees for taking part in the EDI Campus Culture Survey	N/a	4-Jun-25	1	SOU Campus	200	~300	Create a space to gather, enjoy food, and highlight the importance of taking part in the EDI Survey.						
Juneteenth: Flag Raising	A symbolic event to honor the emancipation of enslaved African Americans while serving as a reminder of the resilience, strength, and ongoing struggle for freedom and equality.	Yearly	10-Jun-25	1	Campus	40	~50	Commemorate and celebrate the emancipation of enslaved African Americans in the United States.	Acknowledge the struggles and contributions of African Americans throughout history and highlight the ongoing journey toward racial justice and equality.	Yes	Provide a platform to educate people about the history of slavery, emancipation, and the African American experience, promoting a deeper understanding of American history and the impact of racial inequality.	Partially	Foster community spirit and celebrate African American culture	Yes
Native American Student Graduate Ceremony	Graduate Celebration honoring SOU's Native students.	Yearly	12-Jun-25	1	Graduating Students & Families	* 7 Students * 50 Family / Community Members	* 7 Students * 50 Family / Community Members	Demonstrate SOU's commitment to supporting Native American students and honoring their academic success and cultural identity, recognizing the unique experiences.	Incorporate and celebrate Native American traditions, ceremonies, and symbols to reflect and respect the students' cultural backgrounds	Yes	Reinforce the importance of maintaining and celebrating cultural identity, and showcase the graduates' pride in their heritage.	Yes	Create a ceremony that makes Native American graduates feel valued and connected to both their cultural community and SOU	Yes
Latino/a/x/e Student Graduate Ceremony	Graduate Celebration honoring SOU's Latino/a/x/e students.	Yearly	13-Jun-25	1	Graduating Students & Families	* 30 Students * 100 Family / Community Members	* 21 Students * 75 Family / Community Members	Demonstrate SOU's commitment to supporting Latino/a/x/e students and honoring their academic success and cultural identity, recognizing the unique experiences.	Integrate and celebrate Latino/a/x/e cultural traditions, such as traditional music, dance, and attire, to reflect and respect the students' backgrounds.	Yes	Highlight the important role that family, friends, and the broader community have played in supporting the students' educational endeavors.	Yes	Create a ceremony that makes Latino/a//xe graduates feel valued and connected to both their cultural community and SOU	Yes
Student Podcasts (YouTube)	Student-led and produced podcast by EDI student staff.	Quarterly	Various	4	SOU Students	All campus	80	Increase student participation in campus resources, activities and organizations by highlighting events, initiatives, and opportunities.	Discuss issues relevant to students at SOU	Yes	Highlight key campus leaders and learn more about their role on campus	Yes	Create a sense of belonging	Partially



2024-25 EDI Initiatives (RECAP)				
Initiative	Focus Area	Goal	SDIV Goal Addressed	Initiative Status
EDI Vision & Operational Plan; A guide for Institutional Strategic Planning	All	EDI guide to execute EDI Vision for the next five years & University strategic planning	All	Executed in the 2024-25 academic year. Plan terminated with elimination of OEDI
Nash Framework Implementation	All	Promote explicit and sustained engagement with equity by looking deeply to examine and act on the role of university systems in addressing systemic inequities that are institutionalized, however unintentionally, within our university.	All	Implemented with BoT; Implementation terminated with elimination of OEDI
Equity Scorecard Revision	All	Assess and enhance equity across campus systems.	All	Initial assessment completed by OEDI; Submitted to SOU President
Strategic EDI Campus Programming	Retention	Foster an inclusive and welcoming campus climate where all individuals feel valued, supported and represented	All	Offered 24 activities/programs
EDI Policy	All	Develop new EDI policy	All	Awaiting direction from Leadership
Religious Accommodations Policy	Retention	Develop new religious accommodation policy	All	In Progress
HSI Plan	All	SOU's guide to begin the exploratory process of obtaining HSI status	Goal 1: Structures and Systems to Advance Belonging Goal 2: Supportive Pathways for Access, Retention, and Success	Plan terminated with elimination of OEDI
New Student Affinity Support Cohort – “The Blueprint 2.0”	Retention	Provide the key support structure for students while helping them to discover their passions, communities, and strengths. Ultimately, give students the opportunity to students persist, thrive, and succeed.	Goal 1: Structures and Systems to Advance Belonging	Plan terminated with elimination of OEDI
Vector+	Education & Professional Development	Vector Solutions online training followed by in-person follow-up with planned facilitators. Example: supporting LGBTQ students; facilitating student counseling support; Title IX and faculty/student relationship	Goal 3: Preparing Learners in all Operations	Awaiting implementation
Camp Program	All	Attend HEP Conference; Discuss Grant Cycle & Deadline	Goal 2: Supportive Pathways for Access, Retention, and Success	Plan terminated with elimination of OEDI
Oregon HSI Consortium	Recruitment	<b>Member of the Oregon HSI Consortium Committee</b> The Oregon Hispanic-Serving Institution Consortium (OR HSI Consortium) is a collaborative network of representatives from Oregon colleges and universities. The Consortium is focused on strengthening campus capacity to intentionally serve and respond to the dynamic, growing Latine/Hispanic student body in Oregon.	Goal 2: Supportive Pathways for Access, Retention, and Success	Plan terminated with elimination of OEDI
SOU: The First Year	Retention	Develop cohort program of new hires to guide them through 1st year of SOU employment-- monthly or bi monthly gatherings to learn, meet campus partners, identify ways to be involved -- perhaps tied to Mosaic	Goal 1: Structures and Systems to Advance Belonging	Hosted two events in collaboration with CATL
National Affiliations & Networks	Education & Professional Development	Become member of NADOHE; HACU; & other national affiliations related to EDI efforts	Goal 3: Preparing Learners in all Operations	Terminated with elimination of OEDI
Youth Program Raider Day	Recruitment	Create an annual campus visit program for YP participants	Goal 2: Supportive Pathways for Access, Retention, and Success	Not met
Mosaic Day of Service	Partnership Building	Mosaic members take part of community service event(s)	Goal 1: Systems and Structures to advance Belonging	Not met
Faculty Focus Groups	Retention	Explore the challenges and barriers employees face on campus related to job expectations, value, and sense of belonging which impact employment retention on campus	Goal 1: Structures and Systems to Advance Belonging	Not met; EDI Faculty Liaison Position terminated
Student Professional Development	Retention	Student participant sponsorship to attend conferences	Goal 1: Structures and Systems to Advance Belonging	Not met
Pathway Programs Milestone Letters	Recruitment	Create schedule of letters intended for student participants in specific programs	Goal 2: Supportive Pathways for Access, Retention, and Success	Not met

# Government Relations Report

# This report includes

- State Financial Picture
- Updates on Major HECC Activity
  - Confirmation of SOU Student Demetrius Davis-Boucher
  - Budget Note Report
  - BASE Coalition Proposal
- 2026 Session
  - Budget
  - SOU Priorities
  - Key Legislation Anticipated



# State Financial Picture

- General Fund revenue projections will determine whether cuts to higher education are attempted
  - September: - \$377 million projected for the Ending Balance
  - December: - \$63 million projected for the Ending Balance
  - February: ???
  
- The February Revenue Forecast will be what the Legislature uses to determine whether and where further cuts will be made in state spending from the 2025-27 allocated amounts

# HECC Updates

- Demetrius Davis-Boucher has been confirmed to the HECC as a university undergraduate representative
  - HECC Budget Note report and recommendations have been approved by the HECC
    - Study “targeted integration”
    - HECC should be required to renew academic programs
    - Legislature should consider a “salary pot” to help fund increases in personnel expenses
    - Universities should focus capital requests on information technology infrastructure
    - Legislature should consider “targeted investments” in sustainability and integration
- Universities have responded and continue to respond individually and collectively
- Consideration of the proposal for new BAS Programs in Education has been postponed to April
    - Dialogues happening with HECC, community colleges, K-12 districts; HECC looking for opportunities for collaboration

# 2026 Session

- Potential Budget Reductions
- SOU Priorities
- Policy Proposals
  - Rep. Marsh bill on higher education
  - Student government autonomy in statute

**Questions ? ? ?**

# Academic and Student Affairs Committee Report

# Finance and Administration Committee Report

# Executive, Audit, and Governance Committee Report

# Updated Internal Audit Charter (Action)





Center for Internal Audit  
Post Office Box 751 503-725-5916 tel  
Portland, Oregon 97207-0751 503-725-5800 fax  
1600 SW 4th Avenue, Suite 501

October 15, 2025

Southern Oregon University  
Attn: Sabrina Prud'homme, University Board Secretary  
1250 Siskiyou Blvd, Ashland, OR 97520

Via email to: prudhomms@sou.edu

Dear Sabrina,

In response to your and Rob's request, the following is some more information about the 2024 revised Institute for Internal Auditors (IIA) Global Internal Audit Standards ("GIAS" or "*Standards*") effective January 9, 2025 (*Standards*).

The last major revision of the International Professional Practices Framework ("IPPF" or "*Standards*") was released October 1, 2016 and were effective January 1, 2017. The timing of this coincided with the dissolution of the Oregon University System and the creation of SOU's internal audit function in the spring of 2016. SOU was able to utilize the IIA's 2017 *Standards* internal audit charter template with the addition of two annual assessments similar to what is required for public companies by Sarbanes Oxley, and a small IIA revision in 2018, to create SOU's current internal audit charter.

The Center for Internal Audit (C4IA) has been presenting the change in *Standards* to our client boards for the last year or more because, while internal audit functions are required to implement the new *Standards*, the C4IA completed its quality assurance review and waited for the IIA and other national internal audit organizations to provide the new internal audit charter template, implementation guidance, templates for demonstrating conformance, updates to quality assurance improvement programs and the competency development framework, etc. Updating internal audit charters and coordinating audit committee charters is in every C4IA client's internal audit plan for this fiscal year. While there is an IIA

Guide to Customizing the Model Internal Audit Charter for Public Sector Use, **we recommend no deviations from the model internal audit charter template.**

Please see attached:

- 2025 Draft Revised SOU Internal Audit Charter
- SOU Board Statement on Board Committees

### **What are the changes in *Standards*?**

First, the changes are structural. IPPF 2017 included six major components: mission, core principles, definitions, standards, code of ethics, and implementation guidelines. All of these aspects are now integrated into a single entity known as GIAS in IPPF 2024. The GIAS is then divided into five domains:

- I Purpose of Internal Auditing,
- II Ethics and Professionalism,
- III Governing the Internal Audit Function,
- IV Managing the Internal Audit Function, and
- V Performing Internal Audit Services.

There are fifteen Principles, with these three from Domain III referred to as “**the essential conditions**”:

#### Principle 6 – Authorized by the Board

- The internal audit function receives its mandate from the board (or applicable law in certain public sector environments).
- The mandate specifies the authority, role, and responsibilities of the internal audit function and is documented in the internal audit charter.
- The mandate empowers the internal audit function to provide the board and senior management with objective assurance, advice, insight, and foresight.
- The internal audit function carries out the mandate by bringing a systematic, disciplined approach to evaluating and improving the effectiveness of governance, risk management, and control processes throughout the organization.

### Principle 7 – Positioned Independently

- The board is responsible for enabling the independence of the internal audit function.
- Independence is defined as the freedom from conditions that impair the internal audit function's ability to carry out its responsibilities in an unbiased manner.
- The internal audit function is only able to fulfill the Purpose of Internal Auditing when the chief audit executive reports directly to the board, is qualified, and is positioned at a level within the organization that enables the internal audit function to discharge its services and responsibilities without interference.

### Principle 8 – Overseen by the Board

- Board oversight is essential to enable the overall effectiveness of the internal audit function.
- Achieving this principle requires collaborative and interactive communication between the board and the chief audit executive as well as the board's support in ensuring the internal audit function obtains sufficient resources to fulfill the internal audit mandate.
- Additionally, the board receives assurance about the quality of the performance of the chief audit executive and the internal audit function through the quality assessment and improvement program, including the board's direct review of the results of the external quality assessment.

There are also:

- Requirements: Mandatory practices for internal audits.
- Implementation Considerations: General practices and options to consider when implementing requirements.
- Example of Proof of Conformity: A way to demonstrate that the requirements of the Standard have been implemented.
- Supplemental Guidance, which was previously part of IPPF 2017, is now a stand-alone Global Guidance.

### **Why does this matter to the governance function?**

In our opinion, the Standards now model a shared governance perspective. There are requirements for the internal audit function, the audit committee, and senior

management. Domain III outlines requirements for chief audit executives plus “essential conditions,” which are activities of the board and senior management that enable the internal audit function’s success. Please see attached:

- Exhibit A - Annual Standards Conformance Checklist – Audit Committee, and
- Exhibit B - Annual Standards Conformance Checklist – Senior Management

**What are the “essential conditions”?**

*“The board, senior management, and the internal audit function have a unique partnership in driving organizational success. The three parties must support each other to enable that success.” – The IIA*

First and foremost, the internal audit function is part of the governance function. It must be independent from management in order to provide objective assurance and advise. Internal Audit is a strategic advisor that offers expertise in risk management and refers to best practices, frameworks, guidance, rules, etc. and, with the General Counsel’s concurrence with interpretation, laws. Internal Audit may not make management decisions, design systems/processes or implement programs/initiatives. These are management responsibilities. This is referred to as the Three Lines of Defense Model.

Please see attached:

- IIA GIAS Domain III and Three Lines of Defense Model
- IIA The Essential Relationship Between the Board and Internal Audit

Sincerely,

*Ryan Schnobrich*

Ryan Schnobrich, CPA, CIA, CFE  
Manager of the Center for Internal Audit

[ryan.schnobrich@pdx.edu](mailto:ryan.schnobrich@pdx.edu)

Mobile: 310-916-7220

[LinkedIn Profile](#)



Exhibit A

Annual *Standards* Conformance Checklist – Audit Committee

Standard	Conformance Requirement	Conformance Demonstration
Purpose of Internal Audit	The 2024 Global Internal Audit Standards ( <i>Standards</i> ) apply to any individual or function that provides internal audit services, whether an organization employs internal auditors directly, contracts them through an external service provider, or both.	
6.1	<ul style="list-style-type: none"> <li>• Discuss with the Chief Audit Executive (CAE) and senior management the appropriate authority, role, and responsibilities of the internal audit function.</li> <li>• Approve the internal audit charter, which includes the internal audit mandate and the scope and types of internal audit services.</li> </ul>	
6.3	<p>Support the CAE through regular, direct communications - demonstrated by:</p> <ul style="list-style-type: none"> <li>• Specifying that the chief audit executive reports to a level within the organization that allows the internal audit function to fulfill the internal audit mandate.</li> <li>• Approving the internal audit charter, internal audit plan, budget, and resource plan.</li> <li>• Making appropriate inquiries of senior management and the CAE to determine whether any restrictions on the internal audit function's scope, access, authority, or resources limit the function's ability to carry out its responsibilities effectively.</li> <li>• Meeting periodically with the chief audit executive in sessions without senior management present.</li> <li>• Champion the internal audit function to enable it to fulfill the Purpose of Internal Auditing and pursue its strategy and objectives.</li> </ul>	
7.1	<ul style="list-style-type: none"> <li>• Establish a direct reporting relationship with the CAE and the internal audit function to enable the internal audit function to fulfill its mandate.</li> <li>• Authorize the appointment and removal of the CAE.</li> <li>• Provide input to senior management to support the performance evaluation and remuneration of the CAE.</li> <li>• Provide the CAE with opportunities to discuss significant and sensitive matters with the board, including meetings without senior management present.</li> <li>• Require that the CAE be positioned at a level in the organization that enables internal audit services and responsibilities to be performed without interference from management. This positioning provides the organizational authority and status to bring matters directly to senior management and escalate matters to the board when necessary.</li> <li>• Acknowledge the actual or potential impairments to the internal audit function's independence when approving roles or responsibilities for the CAE that are beyond the scope of internal auditing.</li> <li>• Engage with senior management and the CAE to establish appropriate</li> </ul>	

	<p>safeguards if CAE roles and responsibilities impair or appear to impair the internal audit function's independence.</p> <ul style="list-style-type: none"> <li>• Engage with senior management to ensure that the internal audit function is free from interference when determining its scope, performing internal audit engagements, and communicating results.</li> </ul>	
7.2	<ul style="list-style-type: none"> <li>• Review the requirements necessary for the CAE to manage the internal audit function, as described in Domain IV: Managing the Internal Audit Function.</li> <li>• Approve the CAE's roles and responsibilities and identify the necessary qualifications, experience, and competencies to carry out these roles and responsibilities.</li> <li>• Engage with senior management to appoint a CAE with the qualifications and competencies necessary to manage the internal audit function effectively and ensure the quality performance of internal audit services.</li> </ul>	
8.1	<ul style="list-style-type: none"> <li>• Communicate with the CAE to understand how the internal audit function is fulfilling its mandate.</li> <li>• Communicate the board's perspective on the organization's strategies, objectives, and risks to assist the CAE with determining internal audit priorities.</li> <li>• Set expectations with the CAE for: <ul style="list-style-type: none"> <li>– The frequency with which the board wants to receive communications from the chief audit executive.</li> <li>– The criteria for determining which issues should be escalated to the board, such as significant risks that exceed the board's risk tolerance.</li> <li>– The process for escalating matters of importance to the board.</li> </ul> </li> <li>• Gain an understanding of the effectiveness of the organization's governance, risk management, and control processes based on the results of internal audit engagements and discussions with senior management.</li> <li>• Discuss with the CAE disagreements with senior management or other stakeholders and provide support as necessary to enable the CAE to perform the responsibilities outlined in the internal audit mandate.</li> </ul>	
8.2	<ul style="list-style-type: none"> <li>• Collaborate with senior management to provide the internal audit function with sufficient resources to fulfill the internal audit mandate and achieve the internal audit plan.</li> <li>• Discuss with the CAE, at least annually, the sufficiency, both in numbers and capabilities, of internal audit resources to fulfill the internal audit mandate and achieve the internal audit plan.</li> <li>• Consider the impact of insufficient resources on the internal audit mandate and plan.</li> <li>• Engage with senior management and the CAE on remedying the situation if the resources are determined to be insufficient.</li> </ul>	

8.3	<ul style="list-style-type: none"> <li>• Discuss with the CAE the quality assurance and improvement program, as outlined in Domain IV: Managing the Internal Audit Function.</li> <li>• Approve the internal audit function's performance objectives at least annually. (See also Standard 12.2 Performance Measurement.)</li> <li>• Assess the effectiveness and efficiency of the internal audit function. Such an assessment includes: <ul style="list-style-type: none"> <li>– Reviewing the internal audit function's performance objectives, including its conformance with the <i>Standards</i>, laws, and regulations; ability to meet the internal audit mandate; and progress toward completion of the internal audit plan.</li> <li>– Considering the results of the internal audit function's quality assurance and improvement program.</li> <li>– Determining the extent to which the internal audit function's performance objectives are being met.</li> </ul> </li> </ul>	
8.4	<ul style="list-style-type: none"> <li>• Discuss with the CAE the plans to have an external quality assessment of the internal audit function conducted by an independent, qualified assessor or assessment team.</li> <li>• Collaborate with senior management and the CAE to determine the scope and frequency of the external quality assessment</li> <li>• Consider the responsibilities and regulatory requirements of the internal audit function and the CAE, as described in the internal audit charter, when defining the scope of the external quality assessment.</li> <li>• Review and approve the CAE's plan for the performance of an external quality assessment.</li> </ul> <p>Such approval should cover, at a minimum:</p> <ul style="list-style-type: none"> <li>– The scope and frequency of assessments.</li> <li>– The competencies and independence of the external assessor or assessment team.</li> <li>– The rationale for choosing to conduct a self-assessment with independent validation instead of an external quality assessment.</li> </ul> <ul style="list-style-type: none"> <li>• Require receipt of the complete results of the external quality assessment or self-assessment with independent validation directly from the assessor.</li> <li>• Review and approve the CAE's action plans to address identified deficiencies and opportunities for improvement, if applicable.</li> <li>• Approve a timeline for completion of the action plans and monitor the CAE's progress.</li> </ul>	

Exhibit B

Annual Standards Conformance Checklist – Senior Management

Standard	Conformance Requirement	Conformance Demonstration
6.1	<ul style="list-style-type: none"> <li>• Participate in discussions with the board and CAE and provide input on expectations for the internal audit function that the board should consider when establishing the internal audit mandate.</li> <li>• Support the internal audit mandate throughout the organization and promote the authority granted to the internal audit function.</li> </ul>	
6.3	<ul style="list-style-type: none"> <li>• Work with the board and management throughout the organization to enable the internal audit function's unrestricted access to the data, records, information, personnel, and physical properties necessary to fulfill the internal audit mandate.</li> <li>• The CAE must coordinate the internal audit function's board communications with senior management to support the board's ability to fulfill its requirements.</li> </ul>	
7.1	<ul style="list-style-type: none"> <li>• Position the internal audit function at a level within the organization that enables it to perform its services and responsibilities without interference, as directed by the board.</li> <li>• Recognize the CAE's direct reporting relationship with the board.</li> <li>• Engage with the board and the CAE to understand any potential impairments to the internal audit function's independence caused by non-audit roles or other circumstances and support the implementation of appropriate safeguards to manage such impairments.</li> <li>• Provide input to the board on the appointment and removal of the CAE.</li> <li>• Solicit input from the board on the performance evaluation and remuneration of the CAE.</li> </ul>	
7.2	<ul style="list-style-type: none"> <li>• Engage with the board to determine the CAE's qualifications, experience, and competencies.</li> <li>• Enable the appointment, development, and remuneration of the chief audit executive through the organization's human resources processes.</li> </ul>	
8.1	<ul style="list-style-type: none"> <li>• Communicate senior management's perspective on the organization's strategies, objectives, and risks to assist the chief audit executive with determining internal audit priorities.</li> <li>• Assist the board in understanding the effectiveness of the organization's governance, risk management, and control processes.</li> <li>• Work with the board and the chief audit executive on the process for escalating matters of importance to the board.</li> </ul>	
8.2	<p>Engage with the board to provide the internal audit function with sufficient resources to fulfill the internal audit mandate and achieve the internal audit plan.</p> <p>Engage with the board and the CAE on any issues of insufficient resources and how to remedy any issues of insufficient resources and how to remedy</p>	
8.3	<ul style="list-style-type: none"> <li>• Provide input on the internal audit function's performance objectives.</li> <li>• Participate with the board in an annual assessment of the CAE and internal audit function.</li> </ul>	



8.4	<ul style="list-style-type: none"><li>• Collaborate with the board and the CAE to determine the scope and frequency of the external quality assessment.</li><li>• Review the results of the external quality assessment, collaborate with the CAE and board to agree on action plans that address identified deficiencies and opportunities for improvement, if applicable, and agree on a timeline for completion of the action plans.</li></ul>	
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Global Internal Audit Standards

Domain III: Governing the Internal Audit Function

In an organization, governance structures and processes facilitate the achievement of organizational objectives. These structures and processes also enable the internal audit function to be effective, enhancing:

- The board’s ability to exercise its oversight responsibilities.
- Senior management’s ability to make decisions and manage risks effectively, enabling the achievement of organizational objectives.
- The organization’s ability to create, protect, and sustain value.

In the Global Internal Audit Standards™, Domain III outlines requirements for chief audit executives plus “essential conditions,” which are activities of the board and senior management that enable the internal audit function’s success.

Domain III requires the chief audit executive to meet with the board and senior management to discuss the responsibilities and essential conditions of the Standards and how the parties can collaborate to establish and maintain an effective internal audit function.

The discussion includes informing the board of its role and responsibilities for authorizing the internal audit function, establishing and protecting the function’s independence, and overseeing the function’s performance. Domain III also outlines senior management’s responsibilities to implement the board’s decisions to support and promote governance structures and processes that enable an effective internal audit function.

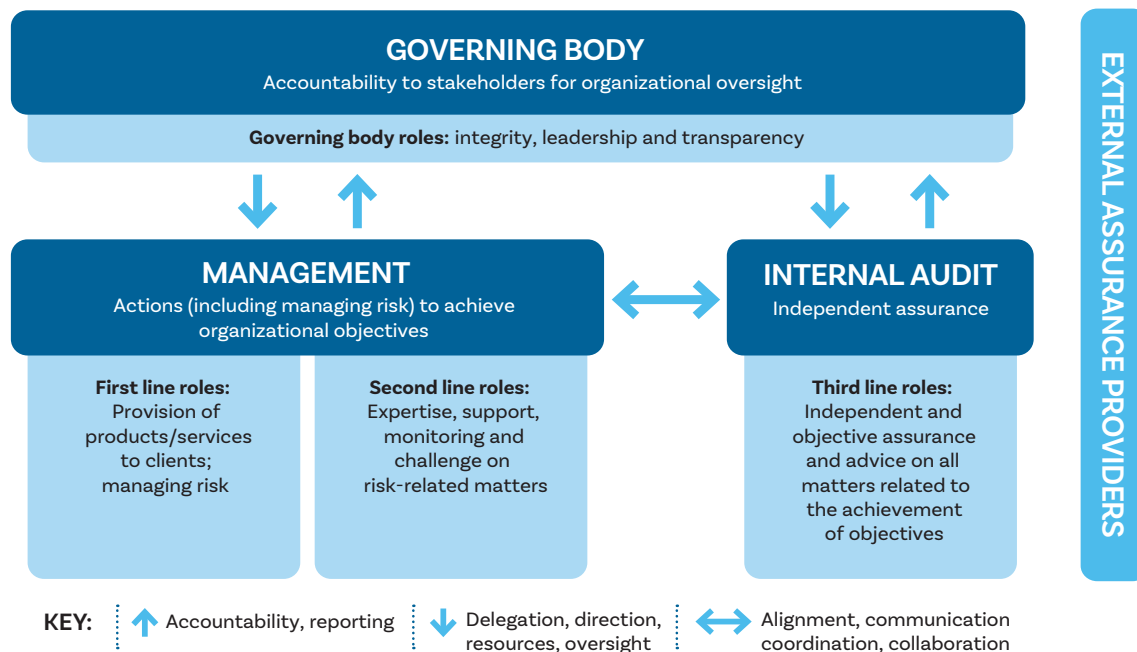


The table below depicts the three principles and nine standards of Domain III.

<p><b>6. Authorized by the Board</b></p> <p>The board establishes, approves, and supports the mandate of the internal audit function.</p> <div><p>6.1 Internal Audit Mandate</p></div> <div><p>6.2 Internal Audit Charter</p></div> <div><p>6.3 Board and Senior Management Support</p></div>	<p><b>7. Positioned Independently</b></p> <p>The board establishes and protects the internal audit function’s independence and qualifications.</p> <div><p>7.1 Organizational Independence</p></div> <div><p>7.2 Chief Audit Executive Qualifications</p></div>	<p><b>8. Overseen by the Board</b></p> <p>The board oversees the internal audit function to ensure the function’s effectiveness.</p> <div><p>8.1 Board Interaction</p></div> <div><p>8.2 Resources</p></div> <div><p>8.3 Quality</p></div> <div><p>8.4 External Quality Assessment</p></div>
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# The Three Lines Model and the Global Internal Audit Standards

The globally recognized **Three Lines Model** illustrates the governance structures and processes that best enable organizations to achieve their objectives. Similarly, Domain III in the Global Internal Audit Standards™ describes the unique partnership between the board, senior management, and the internal audit function that drives organizational success.



In the **Three Lines Model**, the governing body, referred to as the “board” in the Standards, ensures organizational objectives and activities align with the interests of stakeholders and that the organization’s structures and processes enable accountability, actions, and independent assurance and advice. Management, which includes senior and line management, implements actions to achieve the organization’s objectives. The internal audit function is independently positioned to provide objective assurance and advice on the adequacy and effectiveness of governance, risk management, and control processes.

**Domain III in the Global Internal Audit Standards** outlines the requirements and essential conditions necessary for a successful partnership between the board, senior management, and internal audit function.

- In **Principle 6**, the board, senior management, and chief audit executive agree on the authority, roles, and responsibilities of the internal audit function (Standard 6.1 Internal Audit Mandate). The chief audit executive commits to providing the board and senior management with the information they need to support, promote, and oversee the function.
- Principle 7** calls for the internal audit function’s independence from the responsibilities of management, which is critical to internal audit objectivity, authority, and credibility. The function’s independence is enhanced when the board appoints and retains a qualified chief audit executive who reports at a level in the organization that enables internal audit services and responsibilities to be performed without interference from management.
- Principle 8** embodies the notion that board oversight is essential to enable the overall effectiveness of the internal audit function. This requires interactive communication between the board and the chief audit executive as well as the board’s support to ensure the internal audit function obtains sufficient resources to fulfill the internal audit mandate. Additionally, the board receives assurance about the quality of the performance of the chief audit executive and the internal audit function through its oversight of the quality assurance and improvement program and direct review of the external quality assessment results.

# Global Internal Audit Standards

## The Essential Relationship Between the Board and the Internal Audit Function: Opportunities for Board Engagement



The Institute of  
Internal Auditors



# The Importance of Internal Auditing

*An effective internal audit function will enhance:*



The board's ability to exercise its oversight responsibilities.



Senior management's ability to achieve organizational objectives.



The organization's ability to create, protect, and sustain value.

Thus, the board, senior management, and internal audit have a unique partnership in driving ***organizational success***.

***All three parties must support each other to enable that success.***



The Institute of  
**Internal Auditors**

51

# Enabling Effective Internal Auditing



Key to successful achievement of organizational objectives.



Appropriate governance arrangements enable internal audit to fulfill expectations.



The board and senior management are essential to the internal audit function's success.



“Essential conditions” build an effective partnership between the board, senior management, and the CAE.

# Governing the Internal Audit Function

## Principle 6 – Authorized by the Board

The board establishes, approves, and supports the mandate of the internal audit function.

## Principle 7 – Positioned Independently

The board establishes and protects the internal audit function's independence and qualifications.

## Principle 8 – Overseen by the Board

The board oversees the internal audit function to ensure the function's effectiveness.



# What We Need from You –

## Principle 6 Authorized by the Board

- ❖ Determine the appropriate authority, role, and responsibilities of the internal audit function (internal audit mandate).
- ❖ Approve charter, plan, budget, and resource plan.
- ❖ Ensure the CAE reports to a level that allows internal audit to fulfill its mandate.
- ❖ Specify that internal audit should have unrestricted access to data, records, information, personnel, and physical properties.
- ❖ Inquire whether any restrictions exist that limit the internal audit function's ability to carry out its responsibilities.
- ❖ Meet periodically with the CAE in private.



# What We Need from You –

## Principle 7 – Positioned Independently

- ❖ A direct reporting relationship with the CAE and the internal audit function.
- ❖ Authorize the appointment and removal of the CAE.
- ❖ Engage with senior management to appoint a qualified, competent CAE to manage the internal audit function.
- ❖ Provide input to support the CAE's performance evaluation and remuneration.
- ❖ Approve CAE roles or responsibilities beyond the scope of internal auditing.
- ❖ Establish appropriate safeguards if CAE roles and responsibilities impair the internal audit function's independence.

# What We Need from You

## Principle 8 – Overseen by the Board

- ❖ The board's perspective on organizational strategies, objectives, and risks to assist the CAE with determining internal audit priorities.
- ❖ Set expectations with the CAE for:
  - The frequency with which the board wants to receive communications from the CAE.
  - The criteria for determining which issues should be escalated to the board.
  - The process for escalating matters of importance to the board.

# What We Need from You

## Principle 8 – Overseen by the Board *(continued)*

- ❖ Discuss any disagreements with senior management or other stakeholders.
- ❖ Collaborate with senior management to ensure internal audit has sufficient resources.
  - Consider the impact of insufficient resources on the internal audit mandate and plan.
  - Engage with senior management and the CAE on a solution if resources are determined to be insufficient.

# What We Need from You

## Principle 8 – Overseen by the Board *(continued)*

- ❖ Discuss the QAIP with the CAE.
- ❖ Approve internal audit's performance objectives at least annually.
- ❖ Assess the effectiveness and efficiency of the internal audit function.
- ❖ Discuss an EQA of the internal audit function conducted by an independent, qualified assessor or assessment team.
- ❖ Collaborate with the CAE to determine the scope and frequency of the EQA.
- ❖ Review and approve the CAE's plan for an EQA.
- ❖ Receive EQA results from the assessor.
- ❖ Review and approve the CAE's plans to address deficiencies and opportunities for improvement.
- ❖ Approve a timeline for action plan completion and monitor progress.

# Summary



An effective internal audit function enables good corporate governance and the organization's ability to create, protect, and sustain value.



A partnership among the board, senior management, and the CAE is critical to achieving effective internal auditing.



The Global Internal Audit Standards require much from the CAE that, if achieved, will result in an effective internal audit function.



The board and senior management provide necessary support to the CAE and enable effective internal auditing.



# Q&A



The Institute of  
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## **Internal Audit Charter**

### **Board of Trustees of Southern Oregon University**

#### **Purpose**

The purpose of the internal audit function is to strengthen Southern Oregon University's (SOU) ability to create, protect, and sustain value by providing the board and management with independent, risk-based, and objective assurance, advice, insight, and foresight.

The internal audit function enhances SOU's:

- Successful achievement of its objectives.
- Governance, risk management, and control processes.
- Decision-making and oversight.
- Reputation and credibility with its stakeholders.
- Ability to serve the public interest.

SOU's internal audit function is most effective when:

- Internal auditing is performed by competent professionals in conformance with The IIA's Global Internal Audit Standards™, which are set in the public interest.
- The internal audit function is independently positioned with direct accountability to the board.
- Internal auditors are free from undue influence and committed to making objective assessments.

#### **Commitment to Adhering to the Global Internal Audit Standards**

SOU's internal audit function will adhere to the mandatory elements of The Institute of Internal Auditors' International Professional Practices Framework, which are the Global Internal Audit Standards (*Standards*) and Topical Requirements. The chief audit executive will report periodically to the board and senior management regarding the internal audit function's conformance with the *Standards*, which will be assessed through a quality assurance and improvement program.

#### **Authority**

The Board of Trustees of Southern Oregon University grants the internal audit function the mandate to provide the board and senior management with objective assurance, advice, insight, and foresight.

The internal audit function's authority is created by its direct reporting relationship to the board. Such authority allows for unrestricted access to the board.

The board authorizes the internal audit function to:

- Have full and unrestricted access to all functions, data, records, information, physical property, and personnel pertinent to carrying out internal audit

responsibilities. Internal auditors are accountable for confidentiality and safeguarding records and information.

- Allocate resources, set frequencies, select subjects, determine scopes of work, apply techniques, and issue communications to accomplish the function's objectives.
- Obtain assistance from the necessary personnel of SOU and other specialized services from within or outside SOU to complete internal audit services.

### **Independence, Organizational Position, and Reporting Relationships**

The chief audit executive will be positioned at a level in the organization that enables internal audit services and responsibilities to be performed without interference from management, thereby establishing the independence of the internal audit function. (See "Mandate" section.) The chief audit executive will report functionally to the board and administratively (for example, day-to-day operations) to the University President. This positioning provides the organizational authority and status to bring matters directly to senior management and escalate matters to the board, when necessary, without interference and supports the internal auditors' ability to maintain objectivity.

The chief audit executive will confirm to the board, at least annually, the organizational independence of the internal audit function. If the governance structure does not support organizational independence, the chief audit executive will document the characteristics of the governance structure limiting independence and any safeguards employed to achieve the principle of independence. The chief audit executive will disclose to the board any interference internal auditors encounter related to the scope, performance, or communication of internal audit work and results. The disclosure will include communicating the implications of such interference on the internal audit function's effectiveness and ability to fulfill its mandate.

### **Changes to the Mandate and Charter**

Circumstances may justify a follow-up discussion between the chief audit executive, board, and senior management on the internal audit mandate or other aspects of the internal audit charter. Such circumstances may include but are not limited to:

- A significant change in the Global Internal Audit Standards.
- A significant reorganization within the organization.
- Significant changes in the chief audit executive, board, and/or senior management.
- Significant changes to the organization's strategies, objectives, risk profile, or the environment in which the organization operates.
- New laws or regulations that may affect the nature and/or scope of internal audit services.

### **Board Oversight**

To establish, maintain, and ensure that SOU's internal audit function has sufficient

authority to fulfill its duties, the board will:

- Discuss with the chief audit executive and senior management the appropriate authority, role, responsibilities, scope, and services (assurance and/or advisory) of the internal audit function.
- Ensure the chief audit executive has unrestricted access to and communicates and interacts directly with the board, including in private meetings without senior management present, in accordance with laws and/or regulations applicable to public meetings.
- Discuss with the chief audit executive and senior management other topics that should be included in the internal audit charter.
- Participate in discussions with the chief audit executive and senior management about the “essential conditions,” described in the Global Internal Audit Standards, which establish the foundation that enables an effective internal audit function.
- Approve the internal audit function’s charter, which includes the internal audit mandate and the scope and types of internal audit services.
- Review the internal audit charter periodically with the chief audit executive to consider changes affecting the organization, such as the employment of a new chief audit executive or changes in the type, severity, and interdependencies of risks to the organization; and approve the internal audit charter periodically.
- Approve the risk-based internal audit plan.
- Approve the internal audit function’s human resources administration and budgets.
- Approve the internal audit function’s expenses.
- Collaborate with senior management to determine the qualifications and competencies the organization expects in a chief audit executive, as described in the Global Internal Audit Standards.
- Authorize the appointment and removal of the chief audit executive.
- Approve the remuneration of the chief audit executive.
- Review the chief audit executive’s performance.
- Receive communications from the chief audit executive about the internal audit function including its performance relative to its plan.
- Ensure a quality assurance and improvement program has been established and review the results annually.
- Make appropriate inquiries of senior management and the chief audit executive to determine whether scope or resource limitations are inappropriate.

## **Chief Audit Executive Roles and Responsibilities**

### **Ethics and Professionalism**

The chief audit executive will ensure that internal auditors:

- Conform with the Global Internal Audit Standards, including the principles of Ethics and Professionalism: integrity, objectivity, competency, due professional care, and confidentiality.

- Understand, respect, meet, and contribute to the legitimate and ethical expectations of the organization and be able to recognize conduct that is contrary to those expectations.
- Encourage and promote an ethics-based culture in the organization.
- Report organizational behavior that is inconsistent with the organization's ethical expectations, as described in applicable policies and procedures.

### **Objectivity**

The chief audit executive will ensure that the internal audit function remains free from all conditions that threaten the ability of internal auditors to carry out their responsibilities in an unbiased manner, including matters of engagement selection, scope, procedures, frequency, timing, and communication. If the chief audit executive determines that objectivity may be impaired in fact or appearance, the details of the impairment will be disclosed to appropriate parties.

Internal auditors will maintain an unbiased mental attitude that allows them to perform engagements objectively such that they believe in their work product, do not compromise quality, and do not subordinate their judgment on audit matters to others, either in fact or appearance.

Internal auditors will have no direct operational responsibility or authority over any of the activities they review. Accordingly, internal auditors will not implement internal controls, develop procedures, install systems, or engage in other activities that may impair their judgment, including:

- Assessing specific operations for which they had responsibility within the previous year.
- Performing operational duties for SOU or its affiliates.
- Initiating or approving transactions external to the internal audit function.
- Directing the activities of any SOU employee that is not employed by the internal audit function, except to the extent that such employees have been appropriately assigned to internal audit teams or to assist internal auditors.

Internal auditors will:

- Disclose impairments of independence or objectivity, in fact or appearance, to appropriate parties and at least annually, such as the chief audit executive, board, management, or others.
- Exhibit professional objectivity in gathering, evaluating, and communicating information.
- Make balanced assessments of all available and relevant facts and circumstances.
- Take necessary precautions to avoid conflicts of interest, bias, and undue influence.

### **Managing the Internal Audit Function**

The chief audit executive has the responsibility to:

- At least annually, develop a risk-based internal audit plan that considers the input of the board and senior management. Discuss the plan with the board and senior management and submit the plan to the board for review and approval.
- Communicate the impact of resource limitations on the internal audit plan to the board and senior management.
- Review and adjust the internal audit plan, as necessary, in response to changes in SOU's business, risks, operations, programs, systems, and controls.
- Communicate with the board and senior management if there are significant interim changes to the internal audit plan.
- Ensure internal audit engagements are performed, documented, and communicated in accordance with the Global Internal Audit Standards, and laws and/or regulations.
- Follow up on engagement findings and confirm the implementation of recommendations or action plans and communicate the results of internal audit services to the board and senior management periodically and for each engagement as appropriate.
- Ensure the internal audit function collectively possesses or obtains the knowledge, skills, and other competencies and qualifications needed to meet the requirements of the Global Internal Audit Standards and fulfill the internal audit mandate.
- Identify and consider trends and emerging issues that could impact SOU and communicate to the board and senior management as appropriate.
- Consider emerging trends and successful practices in internal auditing.
- Establish and ensure adherence to methodologies designed to guide the internal audit function.
- Ensure adherence to SOU's relevant policies and procedures unless such policies and procedures conflict with the internal audit charter or the Global Internal Audit Standards. Any such conflicts will be resolved or documented and communicated to the board and senior management.
- Coordinate activities and consider relying upon the work of other internal and external providers of assurance and advisory services. If the chief audit executive cannot achieve an appropriate level of coordination, the issue must be communicated to senior management and if necessary escalated to the board.

### **Communication with the Board and Senior Management**

The chief audit executive will report periodically to the board and senior management regarding:

- The internal audit function's mandate.
- The internal audit plan and performance relative to its plan.
- Internal audit budget.
- Significant revisions to the internal audit plan and budget.
- Potential impairments to independence, including relevant disclosures as applicable.

- Results from the quality assurance and improvement program, which include the internal audit function's conformance with The IIA's Global Internal Audit Standards and action plans to address the internal audit function's deficiencies and opportunities for improvement.
- Significant risk exposures and control issues, including fraud risks, governance issues, and other areas of focus for the board that could interfere with the achievement of SOU's strategic objectives.
- Results of assurance and advisory services.
- Resource requirements.
- Management's responses to risk that the internal audit function determines may be unacceptable or acceptance of a risk that is beyond SOU's risk appetite, recognizing that risk acceptance could be a result of funding restrictions impacting management's ability to respond to risks toward strategic objectives.

### **Quality Assurance and Improvement Program**

The chief audit executive will develop, implement, and maintain a quality assurance and improvement program that covers all aspects of the internal audit function. The program will include external and internal assessments of the internal audit function's conformance with the Global Internal Audit Standards, as well as performance measurement to assess the internal audit function's progress toward the achievement of its objectives and promotion of continuous improvement. The program also will assess, if applicable, compliance with laws and/or regulations relevant to internal auditing. Also, if applicable, the assessment will include plans to address the internal audit function's deficiencies and opportunities for improvement.

Annually, the chief audit executive will communicate with the board and senior management about the internal audit function's quality assurance and improvement program, including the results of internal assessments (ongoing monitoring and periodic self-assessments) and external assessments. External assessments will be conducted at least once every five years by a qualified, independent assessor or assessment team from outside SOU; qualifications must include at least one assessor holding an active Certified Internal Auditor® credential.

### **Scope and Types of Internal Audit Services**

The scope of internal audit services covers the entire breadth of the organization, including all of SOU's activities, assets, and personnel. The scope of internal audit activities also encompasses but is not limited to objective examinations of evidence to provide independent assurance and advisory services to the board and management on the adequacy and effectiveness of governance, risk management, and control processes for SOU.

The nature and scope of advisory services may be agreed with the party requesting the service, provided the internal audit function does not assume management responsibility. Opportunities for improving the efficiency of governance, risk management, and control processes may be identified during advisory engagements.

These opportunities will be communicated to the appropriate level of management.

Internal audit engagements may include evaluating whether:

- Risks relating to the achievement of SOU's strategic objectives are appropriately identified and managed.
- The actions of SOU's officers, directors, management, employees, and contractors or other relevant parties comply with SOU's policies, procedures, and applicable laws, regulations, and governance standards.
- The results of operations and programs are consistent with established goals and objectives.
- Operations and programs are being carried out effectively, efficiently ethically, and equitably.
- Established processes and systems enable compliance with the policies, procedures, laws, and regulations that could significantly impact SOU.
- The integrity of information and the means used to identify, measure, analyze, classify, and report such information is reliable.
- Resources and assets are acquired economically, used efficiently and sustainably, and protected adequately.

#### **Acknowledgments/Signatures**

This Southern Oregon University Internal Audit Charter has been reviewed and approved by the SOU Board of Trustees at its meeting on this day,

January, 16, 2026.

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Sabrina Prud'homme,  
University Board Secretary

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Sheila Clough,  
Chair, Board of Trustees

# Higher Education Coordinating Commission Update





# Oregon

Tina Kotek, Governor

## Higher Education Coordinating Commission

Office of the Executive Director

3225 25th Street SE

Salem, Oregon 97302

[www.oregon.gov/HigherEd](http://www.oregon.gov/HigherEd)

TO: Board of Trustees, Southern Oregon University  
FROM: Ben Cannon, Executive Director, HECC  
DATE: January 12, 2026  
SUBJECT: 2026 Q1 Higher Education Coordinating Commission (HECC) Updates

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This document highlights some of the recent actions and initiatives of the Higher Education Coordinating Commission (HECC). For more information on our work, initiatives, and programs, go to: [www.oregon.gov/highered](http://www.oregon.gov/highered) or [sign up for our mailings lists for email updates](#).

### HECC Adopts Report on Spending and Efficiency at Oregon Public Universities, Recommends Changes to Protect Student Access and Success

The 2027-29 higher education budget bill (SB 5525, 2025) directed the Higher Education Coordinating Commission (HECC) to assess cost efficiencies at Oregon's public universities. On January 6, 2026, HECC released its [report on spending and efficiency, available here](#).

The report analyzes trends in student costs, university spending, staffing, and efficiency across Oregon's seven public universities. It also proposes five actions for legislative consideration during the 2026 session that would significantly improve efficiency while protecting access and student success:

- **Plan for targeted institutional integration by January 2027.** Direct the HECC, in consultation with public universities and community colleges, to develop proposals ranging from deeper shared services to formal affiliations or mergers—prioritizing institutions that signal interest and ensuring academic access is maintained or enhanced.
- **Establish periodic program review and renewal.** Require public university degree programs to demonstrate value, mission alignment, non-duplication, minimum enrollment/financial sustainability, and equitable impacts—paired with clear guardrails and ample time for corrective action.
- **Create a separate salary pool for essential compensation increases.** Appropriate a biennial state fund to support reasonable, predictable compensation adjustments across institutions.
- **Prioritize replacement of major IT infrastructure in capital planning.** Use state-backed bonding where appropriate to modernize core systems, strengthen cybersecurity, and enable interoperable platforms that reduce administrative costs.
- **Continue funding targeted sustainability and integration initiatives.** Building on the \$25 million investment made during 2023-25 aimed at improving the long-term financial sustainability of the Technical and Regional Universities (TRUs) and Portland State University, expand one-time investments that help universities streamline programs, improve student success, and share administrative functions—scaling evidence-based projects statewide.

The report does not analyze academic quality and notes that complex trade-offs may exist between improving cost efficiency and sustaining or enhancing student access and success.

### Strategic Planning for 2027 Session

During each legislative session and continually, HECC works closely with many of our partners on the legislative and budget development process. You can learn more about the typical [budget development timeline](#) on our public website. The HECC staff play a key role in developing the legislative concepts

(LCs) and policy option packages (POPs), which HECC ultimately pursues during legislative sessions. The HECC is already in the early stages of planning for **2027 legislative concepts and budget proposals, having started an internal idea generation and collection period**. In the coming months, the HECC will develop a list of proposals for further consideration and engagement with external partners, leading into a period of final consideration over the summer and fall.

### **Oregon Joins Multi-State Collaborative and Launches Process to Redesign State Postsecondary Education Goal**

**The HECC has started a collaborative process to develop a proposal for a new approach to Oregon's postsecondary educational attainment goals, aiming for a new draft goal for consideration by June 2026.** For more than a decade, Oregon has been working toward two state [education goals](#): the ambitious statewide 40-40-20 goal for young adults, and the more recently adopted adult attainment goal, focused on credential attainment, in addition to numerous other goals defined by statute. The HECC and partners plan to revisit current statutory goals, and to develop a proposal to replace Oregon's current 40-40-20 education attainment goal, which has an end date of 2025.

HECC will be working with partners across Oregon and 12 other states through the [Lumina Foundation's State Attainment Collaborative](#). Together, as this group considers state goals, they are exploring what makes a credential truly valuable, and how a goal can drive policies and programs to better support today's learners.

In addition to benefiting from the multi-state collaborative, the HECC has convened an Oregon steering committee to advise staff on Oregon's new goal. The committee includes representatives from the Oregon Legislature, community colleges, universities, K-12 education, workforce partners, economic development leaders, business and community leaders, partner agencies, and others.

### **Commission Approves Transfer Vision and Report**

The HECC and public institutions, through the Transfer Council, are working together to [streamline the transfer of credits](#) between Oregon's 17 community colleges and seven public universities. In December, the Commission approved and submitted to the Oregon Legislature its [annual report on postsecondary transfer, available here](#).

Also at its December Commission meeting, the **HECC approved a public-facing [vision statement for transfer](#) that is intended to guide the next phase of transfer work** in Oregon and affirm the HECC's commitment to a seamless student-centered transfer system. In addition to the vision statement, the Commission reviewed a proposed four-phase work plan to operationalize this vision. The largest focus area is centered on improving statewide alignment, which will require legislative action in 2027 to achieve.

### **Our Vision**

- *We imagine an Oregon where transferring between colleges is simple, clear, and fair for every student. A strong transfer system should:*
  - *Let students transfer credits without losing time or progress toward their bachelor's degree*
  - *Lower costs by preventing students from having to retake classes*
  - *Make sure all public colleges and universities treat transfer credits consistently*
  - *Give students and families clear, easy-to-find information about how transfer works*
  - *Align common courses and general education requirements so transfer paths are easier to follow*
  - *Build trust and confidence between students and institutions*

# The Enrollment Landscape

# Enrollment Landscape



Dr. Carrie Vath, Zac Olson  
Jan 16, 2025

# References

**EAB:** a major consulting firm that provides research, software and marketing services to over 2,500 institutions. *Credibility: Highly credible for best-practice research and strategic enrollment management.*

**Western Interstate Commission for Higher Education (WICHE):** An interstate compact of 16 Western states (including Oregon) that facilitates regional resource sharing, such as the Western Undergraduate Exchange (WUE). *Credibility: Widely considered the national gold standard for demographic projections, particularly through their flagship reporting, Knocking at the College Door*

**Higher Education Coordinating Commission- Oregon (HECC):** The state agency responsible for coordinating funding, policy, and academic program approval for Oregon's 7 public universities and 17 community colleges. *Credibility: The official and most authoritative source for Oregon-specific higher education data, including state-mandated enrollment, graduation, and retention reporting.*

**EdSights:** Specialized technology company that uses AI-powered SMS chatbots to collect non-cognitive data (like student belonging and financial stress) to predict and prevent dropouts. *Credibility: Highly respected in the student retention and engagement niche for providing real-time, qualitative insights that traditional data systems often miss*

**Ruffalo Noel Levitz (RNL):** a leading provider of data-driven solutions for enrollment, student success and fundraising. *Credibility: a primary industry leader for market research and recruitment strategy. They share annual reports on student marketing trends that is a staple for university admissions offices.*

**Encourage:** An education data science and research organization that provides data on prospective student interests and institutional performance. *Credibility: known as a top-tier research authority for institutional strategy and market "intel".*

# Key Terms

**Headcount:** # of individuals enrolled in credit-bearing courses. Includes Undergraduate, Graduate, Advanced Southern Credit (ASC; dual-enrollment), OLLI, WorkDay Training Credits, etc.

SOU Fall25 Headcount: 5,444

Change over time: -8.7% since 2019

**Full-Time Equivalency (FTE):** metric used to convert total student credit hours into a single number that represents the equivalent of "full-time" students. It is often a more accurate measure for budgeting and faculty workload than headcount.

SOU Fall25 FTE: 3,485

Change over time: -13.5% since 2019

**Student Credit Hours (SCH):** total number of credits all student are enrolled in. This is the primary driver of tuition revenue for the university.

**Retention:** The percentage of first-time, full-time freshmen who return to SOU for their second year (sophomore year).

SOU F25 Retention: ~69%

10-year Range: 66%-72%

**6-year Graduation rate:** The percentage of a "starting cohort" of first-time, full-time freshman who complete their degree within six years.

SOU 2024 6-Year Graduation Rate = 43%

10-year Range: 31% to 45%



# Key Terms, Con't

**Student Credit Hours (SCH):** total number of credits all student are enrolled in. This is the primary driver of tuition revenue for the university.

## Why show SCH to the Governing Board?

- **Financial Forecasting (Revenue):** Tuition is charged by the credit hour. A board needs to see SCH to understand if the university is meeting its revenue targets. For example, if headcount stays the same but SCH drops, it means students are taking fewer classes (shifting from full-time to part-time), which results in a significant budget shortfall.
- **State Funding Impact:** In Oregon, the Student Success and Completion Model (SSCM) used by the HECC allocates state funds partly based on credit hour completion. The board monitors SCH to ensure SOU is maximizing its share of state appropriations.
- **Institutional Productivity:** SCH underpins FTE calculations, enabling efficiency comparisons with peer institutions.

## Why show SCH by Department?

- **Resource Allocation:** Departments with high SCH production (like General Education "service" courses) often "subsidize" smaller, more specialized programs. The board uses this to inform investment and consolidation decisions.
- **Instructional Efficiency:** SOU tracks the ratio of SCH to Faculty Loading Units (ELU). This identifies which departments are operating at capacity and which have "low-enrolled" sections that are expensive to maintain.
- **Identifying Market Demand:** Shifts in departmental SCH highlight changing student interests and inform program expansion or sunseting.
- **Program Viability:** Departmental SCH is a core input for program review and financial sustainability decisions.

## Key Takeaways:

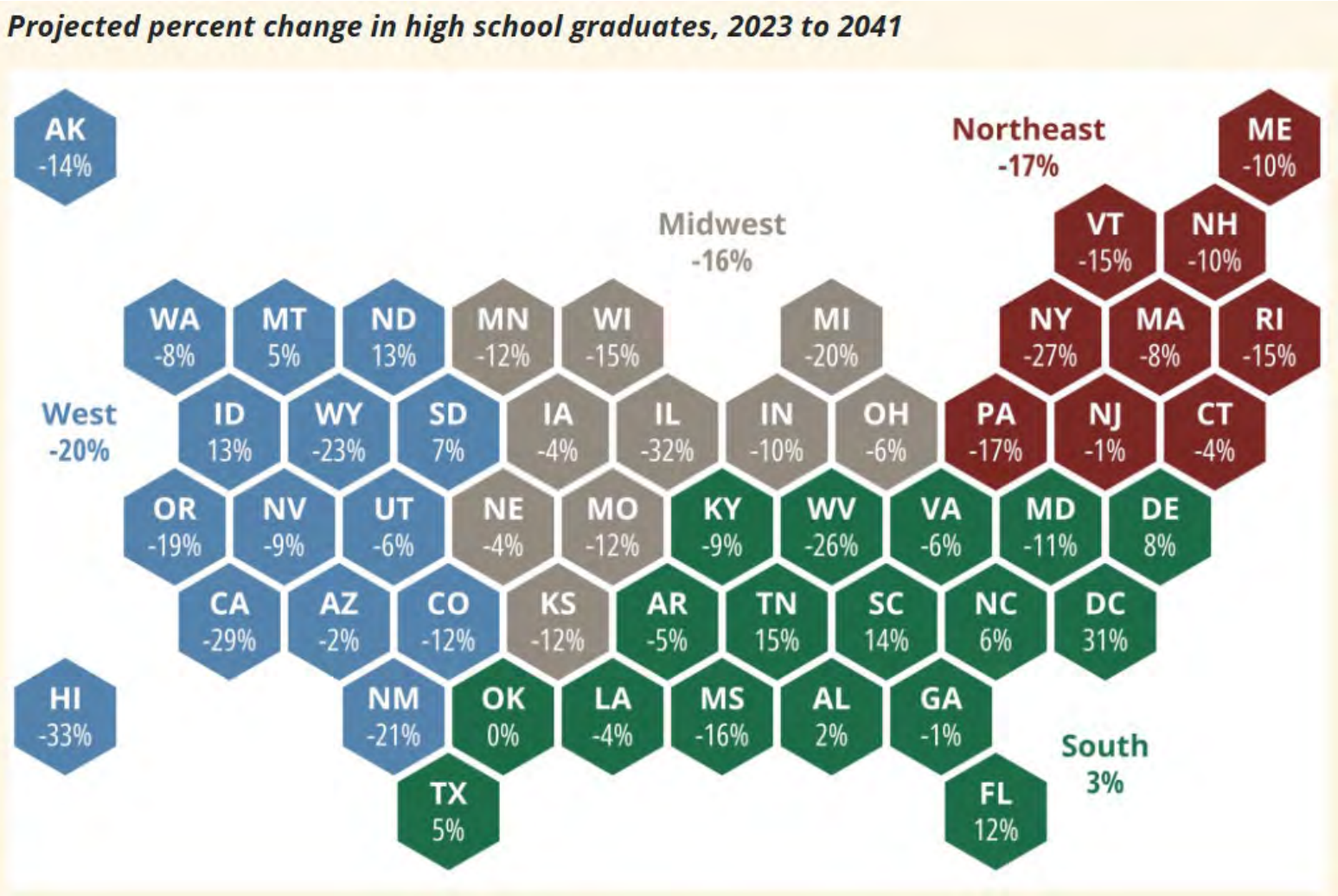
Metric	2019 (Pre-Pandemic)	Fall 2025	Status
Headcount	5,966	5,444	Stabilizing (due to ASC and OLLI)
FTE	4,031	3,485	Down
SCH	56,589	50,840	Down
Retention	70%	69%	Steady
6-year Grad Rate	40%	43%	Improving



# Enrollment Challenges National Level

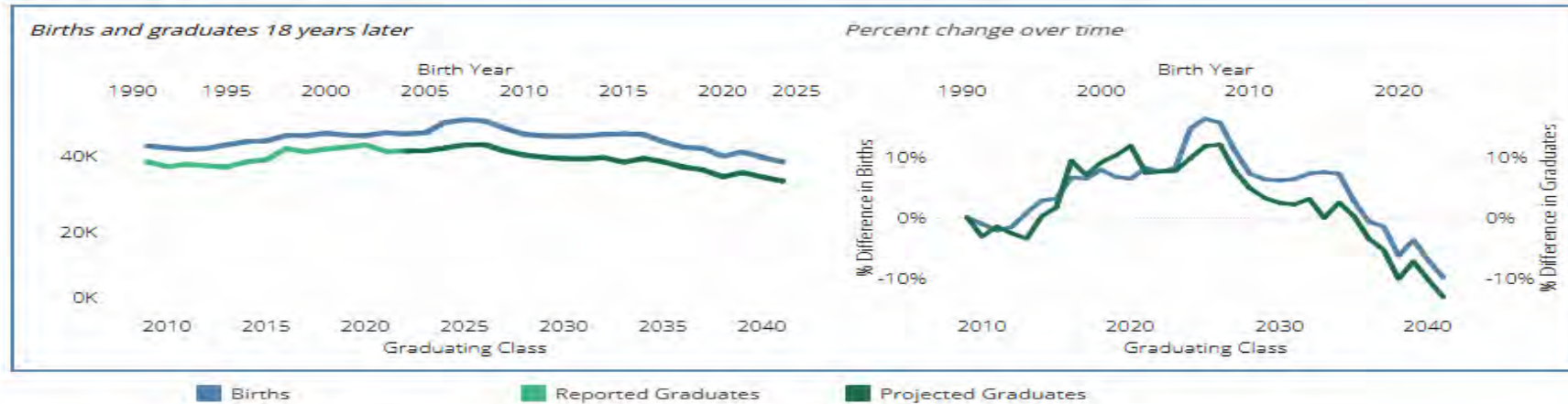
- Demographic Cliff Arrives
- Bigs Getting Bigger
- Families' increasing affordability concerns
- Universal focus on value
- Increasing pressure on ROI/Economic Impact
- Changing Consumer Behavior
- Evolving Federal Policy Landscape and Ongoing executive orders (FAFSA)

# Demographic Cliff

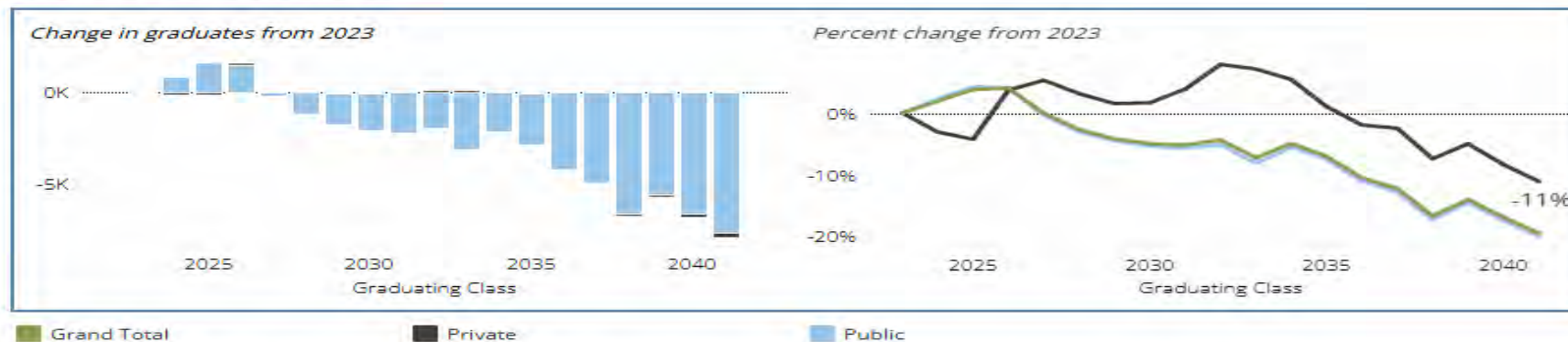


# Demographic Cliff (Oregon)

## Birth and Graduate Trends



## Projected Graduate Trends

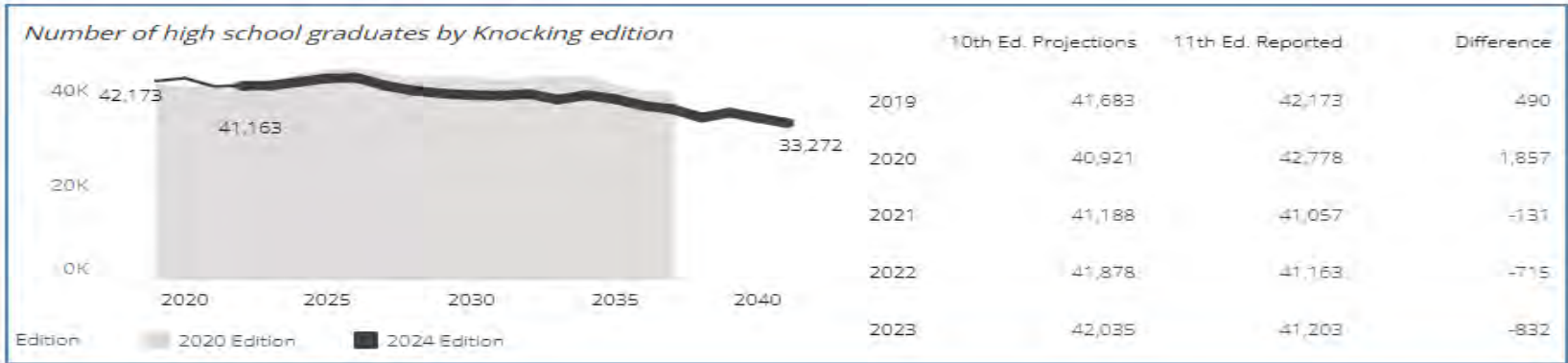


Sources: Western Interstate Commission for Higher Education. (2024). *Knocking at the College Door*. [www.wiche.edu/knocking](http://www.wiche.edu/knocking) and U.S. Centers for Disease Control and Prevention. See the data notes page for more information.

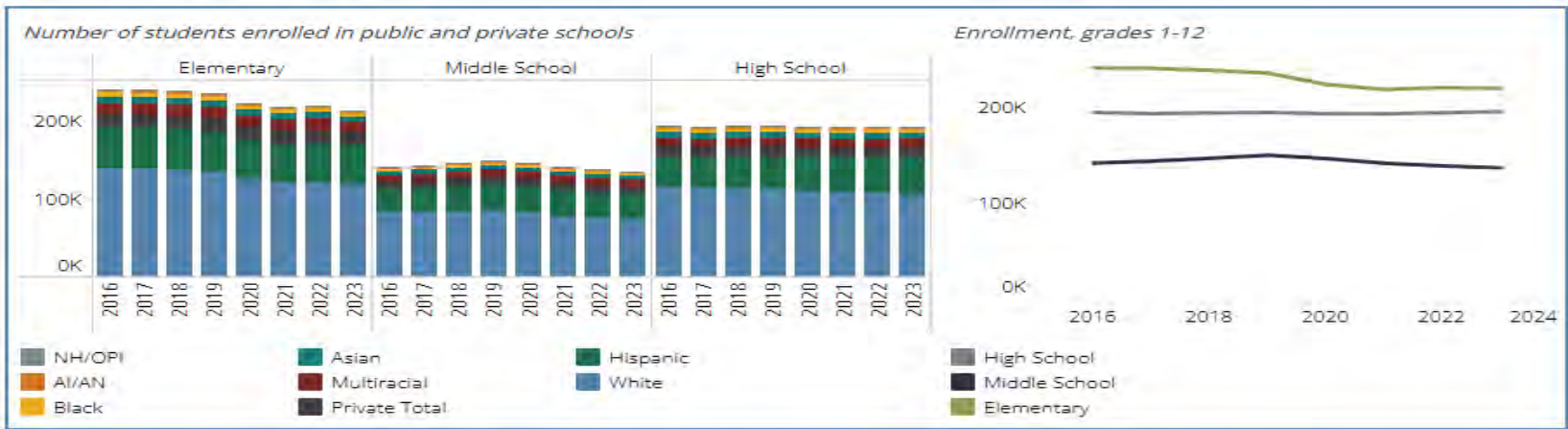


# Demographic Cliff (Oregon)

Projections of Graduates by *Knocking* Edition



Enrollment, 2016-17 to 2023-24



Source: Western Interstate Commission for Higher Education. (2024). *Knocking at the College Door*. [www.wiche.edu/knocking](http://www.wiche.edu/knocking). See the data notes page for more information. Larger line represents projected values.

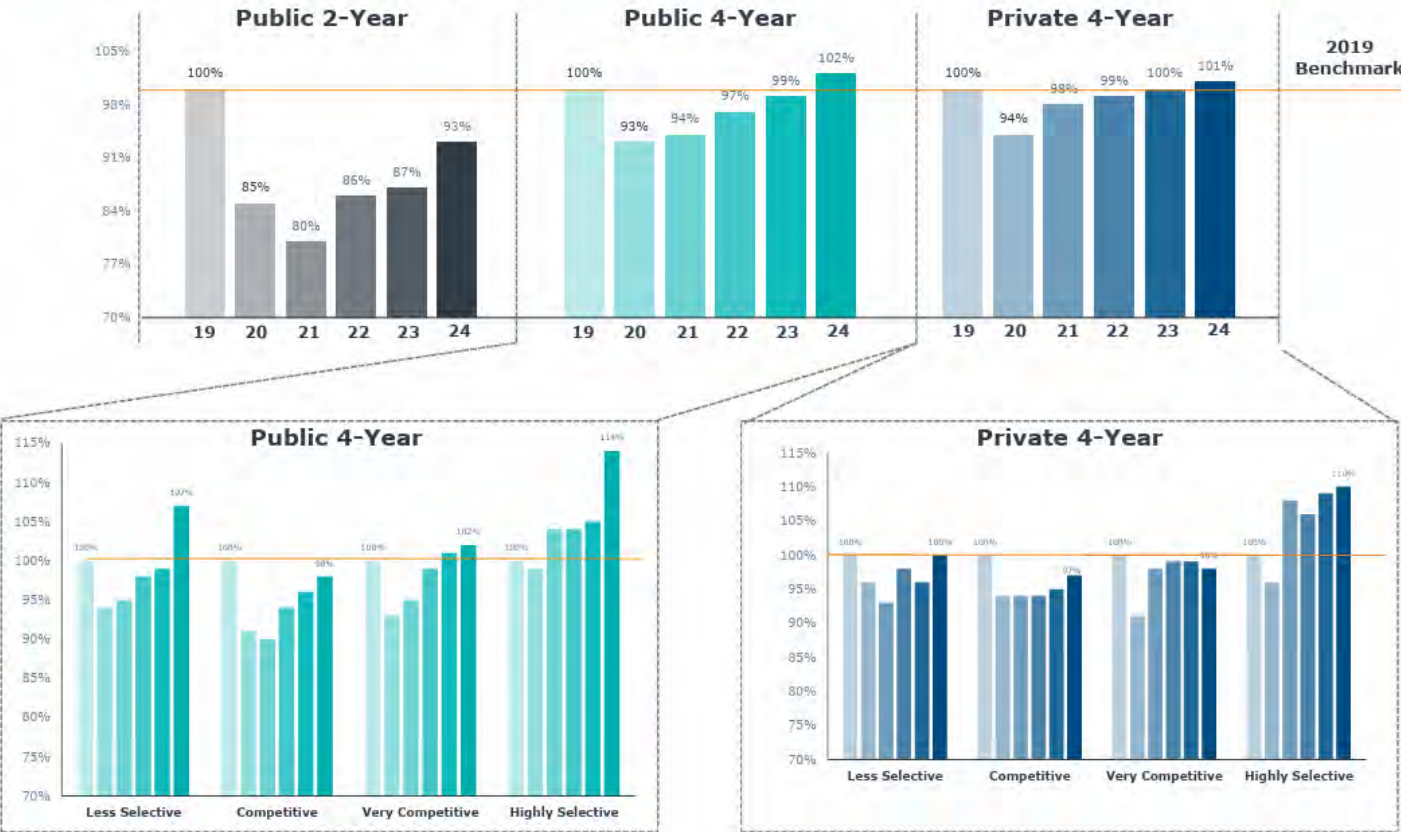




# Bigs Getting Bigger

## Change in Traditional First-Year Enrollment 2019 -2024

By Sector and Selectivity, Indexed to 2019



# Bigs Getting Bigger

## The Big (Public) Institutions Keep Getting Bigger

Change in First-Time Enrollments by Number, Fall 2019-Fall 2023

	Public 4-Year	Private Non-Profit 4-Year	Private For-Profit 4-Year	Primarily Online Institution <sup>2</sup>
Number of Institutions	806	1,542	265	153
Large, More Selective	+19,623	+2,117	+1,495	+1,775
Large, Less Selective	+34,390	+1,937	+455	+5,081
Large, Open Access	-7,357	-822	+4,958	+4,088
Small, More Selective	+665	+1,416	-19	+255
Small, Less Selective	-5,503	-7,103	-669	+828
Small, Open Access	-3,503	+1,571	+577	+3,055

Greater Decline ← [Orange] [Light Orange] [Light Blue] [Blue] [Dark Blue] → Greater Growth

1) Large institutions have greater than 10k total enrollments. More selective institutions admitted fewer than 65% of applicants in Fall 2023.  
2) Primarily Online Institutions enrolled >90% of all students online in Fall 2023.  
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Source: IPEDS Fall Enrollment Data; EAB interviews and analysis.

# Bigs Getting Bigger

Full-time equivalent enrollment at Oregon public universities in fall term, by year

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Eastern Oregon University	2,274	2,221	2,152	2,171	2,133	2,124	2,050	1,973	1,973	2,082	2,004
Oregon Institute of Technology	3,108	3,239	3,236	3,218	3,247	3,214	2,990	2,907	2,898	3,045	3,132
Oregon State University	25,878	26,527	26,865	26,779	27,120	27,013	27,575	28,585	29,983	31,545	32,350
Portland State University	20,162	19,721	19,563	19,252	18,816	17,428	16,522	15,668	14,977	14,585	14,242
Southern Oregon University	4,408	4,293	4,383	4,204	4,030	3,512	3,321	3,264	3,236	3,209	3,150
University of Oregon	22,598	22,629	22,207	22,081	22,105	21,263	21,781	22,706	23,257	24,072	24,299
Western Oregon University	4,513	4,529	4,452	4,310	4,068	3,769	3,300	3,069	3,171	3,083	2,978
<b>State</b>	<b>82,941</b>	<b>83,159</b>	<b>82,857</b>	<b>82,015</b>	<b>81,520</b>	<b>78,325</b>	<b>77,539</b>	<b>78,172</b>	<b>79,495</b>	<b>81,622</b>	<b>82,155</b>

Source: HECC analysis of student-level data, November 19, 2025.



## The findings are clear...

- EAB 2025 Study: Cost is the #1 factor in student decisions
- 2025 Encoura and RNL Student Satisfaction Report: Cost is #1 Factor
- EdSights 2025 Persistence Student: Financial Stress (balancing work and school), and tuition payments is top stressor for 4-year public students

## Which factors influence the decision to enroll?

These satisfaction surveys ask students to indicate a level of importance for a variety of factors that may have influenced their decision to enroll. Here are the top indicators across institution types and for adult and online learners.

ENROLLMENT FACTOR	FOUR-YEAR PRIVATES	FOUR-YEAR PUBLICS	COMMUNITY COLLEGES	ADULT STUDENTS	ONLINE LEARNERS
Cost	81%	83%	86%	81%	86%
Financial aid	84%	83%	84%	79%	83%
Academic reputation	76%	73%	77%	80%	82%
Size of institution	59%	57%	63%	54%	N/A
Recommendations from family/friends/ employer	50%	52%	62%	59%	64%
Geographic setting / Campus location	60%	64%	73%	71%	69%
Personalized attention prior to enrollment	62%	61%	69%	69%	N/A





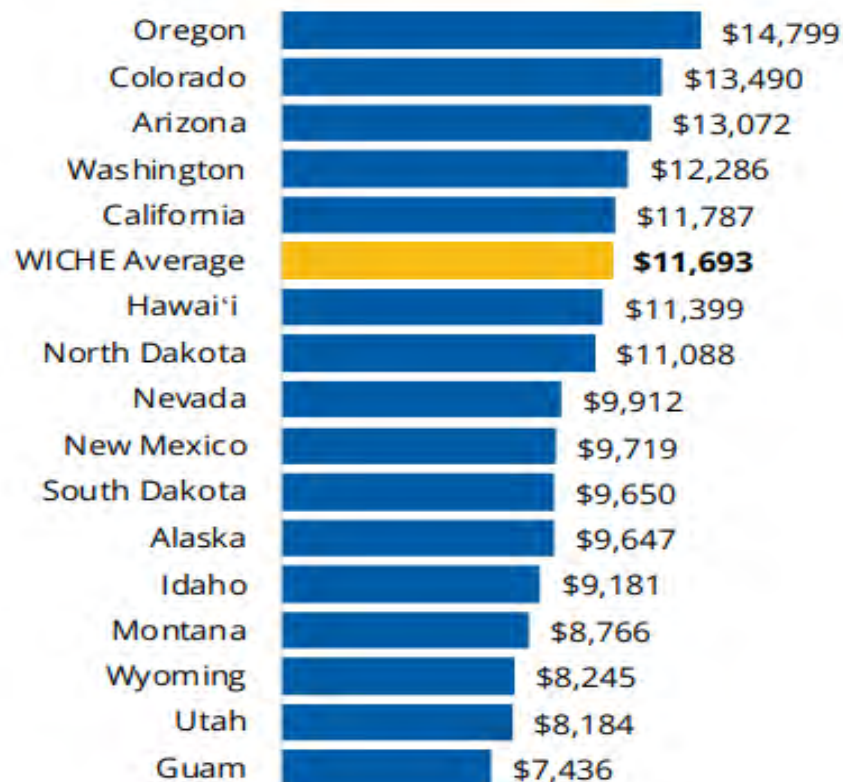
# Affordability

## STATE VARIATION IN RESIDENT UNDERGRADUATE TUITION AND FEES

Regional average tuition and fees provide a benchmark for trends in price for students and families in the region, but it is important to note that state tuition and fee trends vary significantly, including both average rates and changes in reported charges.<sup>4</sup> For example:

- ▶ In AY 2025-26, state average tuition and fees for resident undergraduates range from \$7,436 to \$14,799 (Figure 2).
- ▶ Between AY 2024-25 and AY 2025-26, tuition and fees remained the same in Guam, while all other states reported an on average annual increase between 1.2% and 6.4% (see Table 3b; p. 14).
- ▶ Tuition and fees vary even more across institutions and systems within a state, as shown in Table 4a (see p. 16). For example, tuition and fees at the University of Utah are \$10,849, while tuition and fees at Utah Tech University are \$6,482.

*Figure 2. State Average Resident Tuition and Fees at Four-Year Institutions, Weighted, AY 2025-26*



# Value

Students

## Mixed Emotions About Value and ROI

17

### For Every Positive Headline...

**84%** of college students rate their education as highly or somewhat valuable

~**90%** of recent grads said their college prepared them for their next career step

**Belief in Value**

### ...There's a More Negative Indicator

Only **7%** of college students agree institutions offer a good value for what they charge

Only **44%** of alumni felt their degree was worth the student loan debt

**Confidence in ROI**



### Underlying Drivers of Variation

- How questions are worded (e.g., your vs all institutions, value vs valuable)
- When students are surveyed (e.g., pre- vs post-graduation)
- Respondent demographics and majors



### Negativity Has An Outsized Impact

- Each additional negative word in a headline boosts click rates by 2.3%
- People are more likely to remember and give negative news a greater weight

Source: Inside Higher Ed, [Career Support Boosts Alumni Perception of College's Value](#) and [Students' Fresh Thoughts on Value and Affordability](#); NACE, [College Is Worth It: Class of 2024 Says College Prepared Them Well for Their Careers](#); Nature, [Negativity drives online news consumption](#); EAB interviews and analysis.



# Value

## Non-Consumers Not Budging on Skepticism



21

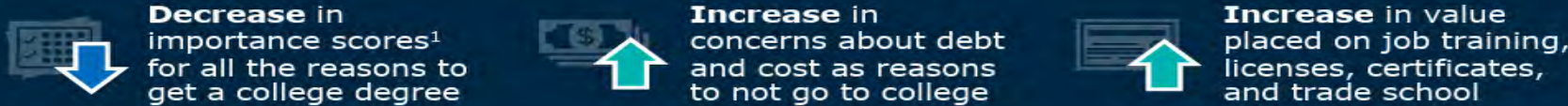
### Four Key Mindsets of Students Opting Out of College

Gates Foundation Focus Groups and Survey (n=1,625)



### Concerns About Value Not Trending in the Right Direction

Changes in Non-Consumer Attitudes Between 2022 and 2023



1) Respondents were asked to assess how important (e.g., very, somewhat) eleven different reasons for getting a college degree were.

# Value

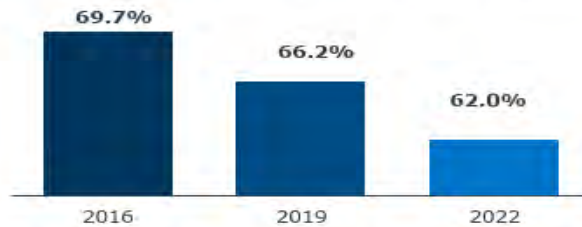
## The Echo Chamber's Impact on Enrollment Decisions

13

Despite Inaccuracies, Some Students Dissuaded by Negative Narratives

### Recent HS Grads Less Likely to Enroll

College-Going Rate of Recent High School Grads, Bureau of Labor Statistics



“

**I've always seen and heard things about how there's no point in going to college...** 'cause you usually end up with more debt than you can make, and it rarely works out for a lot of people that want to go.”

21-year-old Hispanic man who did not attend college  
**EAB Non-Consumer Survey, 2023**

”

### Snapshot of Current Non-Consumers

**59%**

Male

**27%**

Hispanic

**60%**

Living with parents or grandparents

**\$9K**

Difference in median household income between non-consumers and college-going peers

**16%**

Black/African American<sup>1</sup>

**48%**

White<sup>1</sup>

**1 in 3**

Unemployed or not looking for work<sup>2</sup>

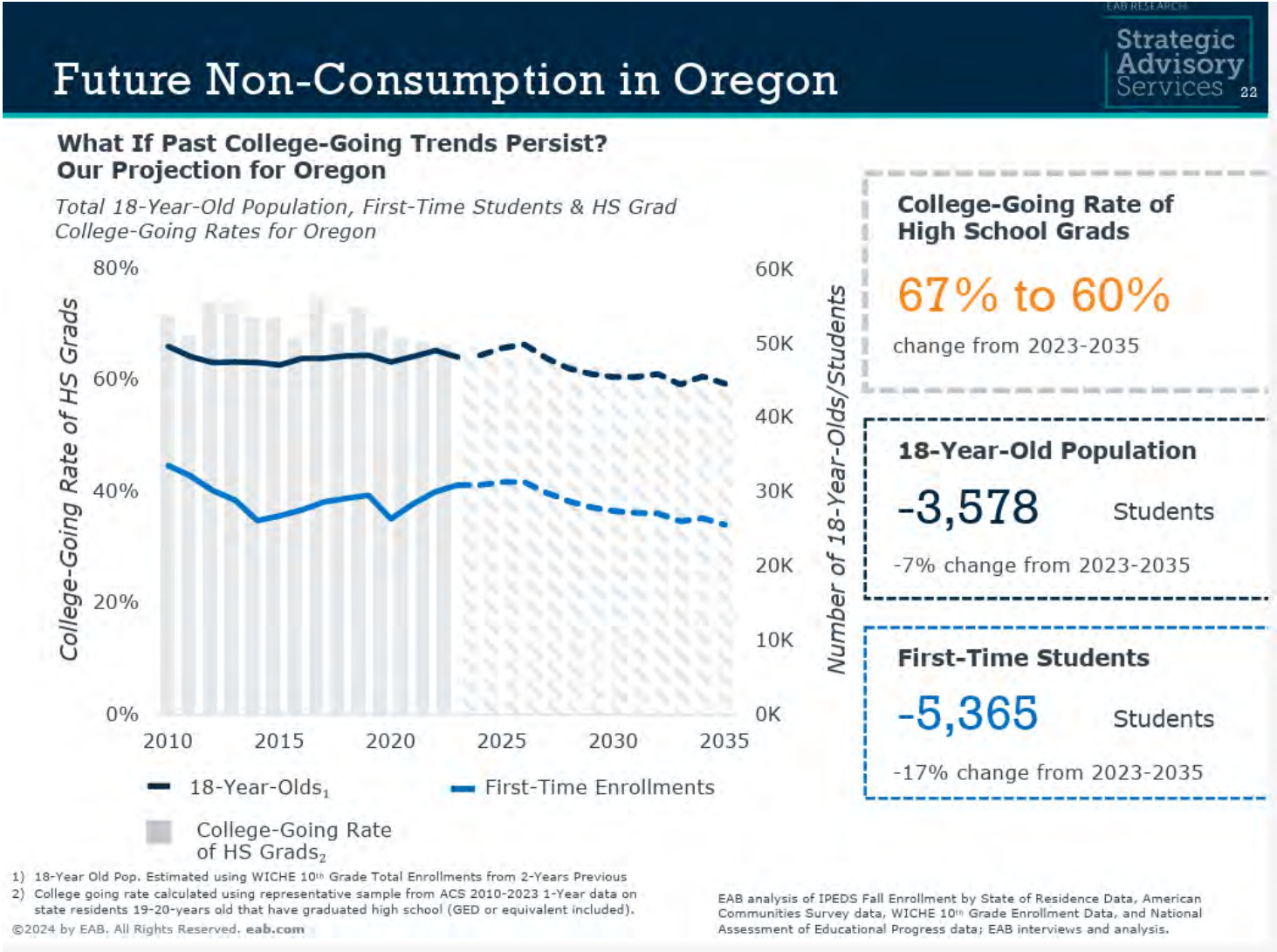
1) Non-Hispanic population.

2) Excludes those not working due to disability

Source: Bureau of Labor Statistics, “[The Economics Daily](#),” May 22, 2017; Bureau of Labor Statistics, “[The Economics Daily](#),” May 22, 2020; Bureau of Labor Statistics, “[Economic News Release](#),” April 26, 2023;



# Non-Consumption



SO

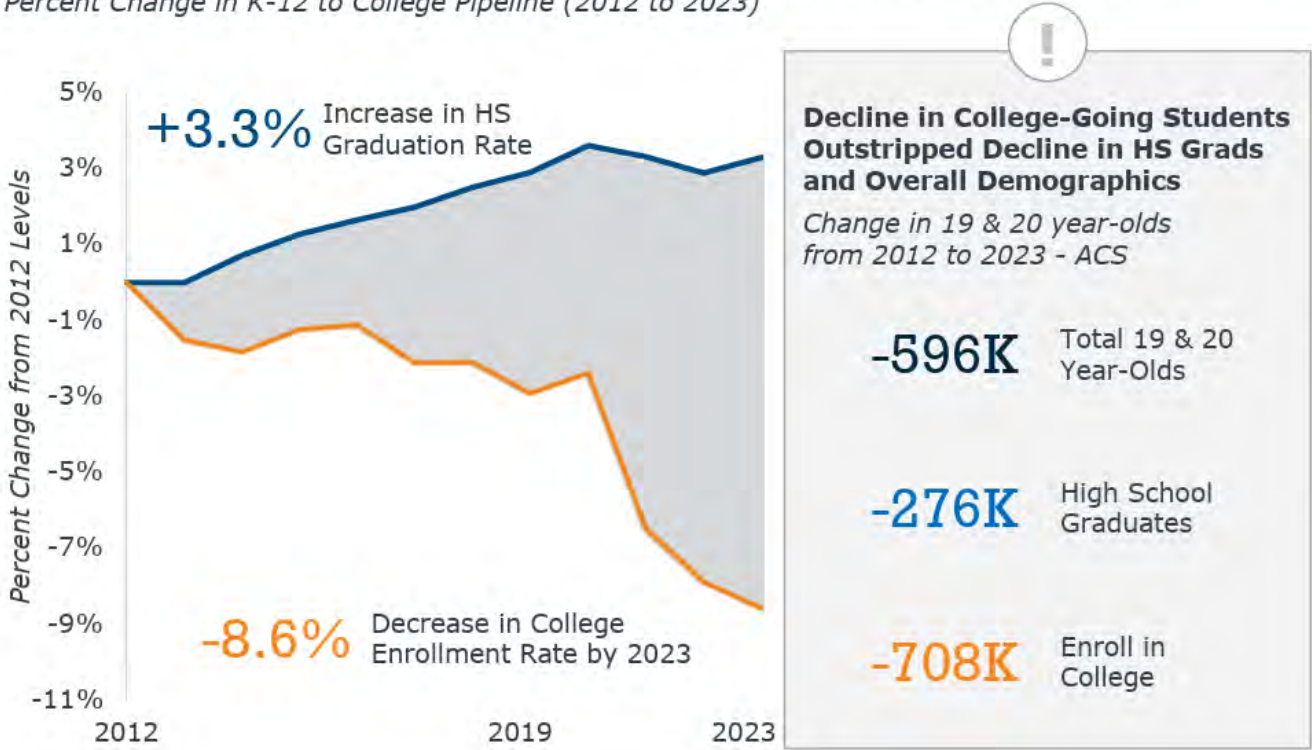
Southern OREGON  
UNIVERSITY

91

# Non-Consumption

## “College? No Thanks, I’m Good”

The Non-Consumer Undergraduate Market Is Getting Bigger Every Year  
Percent Change in K-12 to College Pipeline (2012 to 2023)



# ***SOU's Enrollment Challenges and Response:***

<b>Challenge</b>	<b>SOU's Response/Strategy</b>
Declining Oregon High School Graduates	SOU has secured K-12 data partnerships, Community College MOU's
Decreasing State Support for Higher Education	President Council and Government Relations advocating for state support
Bigs getting BIGGER (competition)	SOU needs to identify who we are and what we have to offer that differentiates us.
Rising Cost of attendance and institutional operations	SOU needs to continually monitor costs and financial stability
Regional perception of SOU (Blueberry in tomato soup)	SOU needs to decide if we are what people perceive us to be or if we want to change perceptions.
Oregon is 44th in nation for public funding higher education per student, Oregon tuition is 1.5 times the US average to compensate for lack of state support	SOU needs to understand that we cannot compete on price so we need to have a value proposition to justify the higher cost.
Funding FTE per student in Oregon is ~\$9,705, 17% below US average	ROI/ Value proposition
Oregon's college going rate is ~54.4% (national average comparison is 62%)	Need to continue to promote and justify value of Higher Ed.
Price sensitivity impacts students/families school choice	Need to have ROI and Value proposition

## Select Best Practices in Student Recruitment

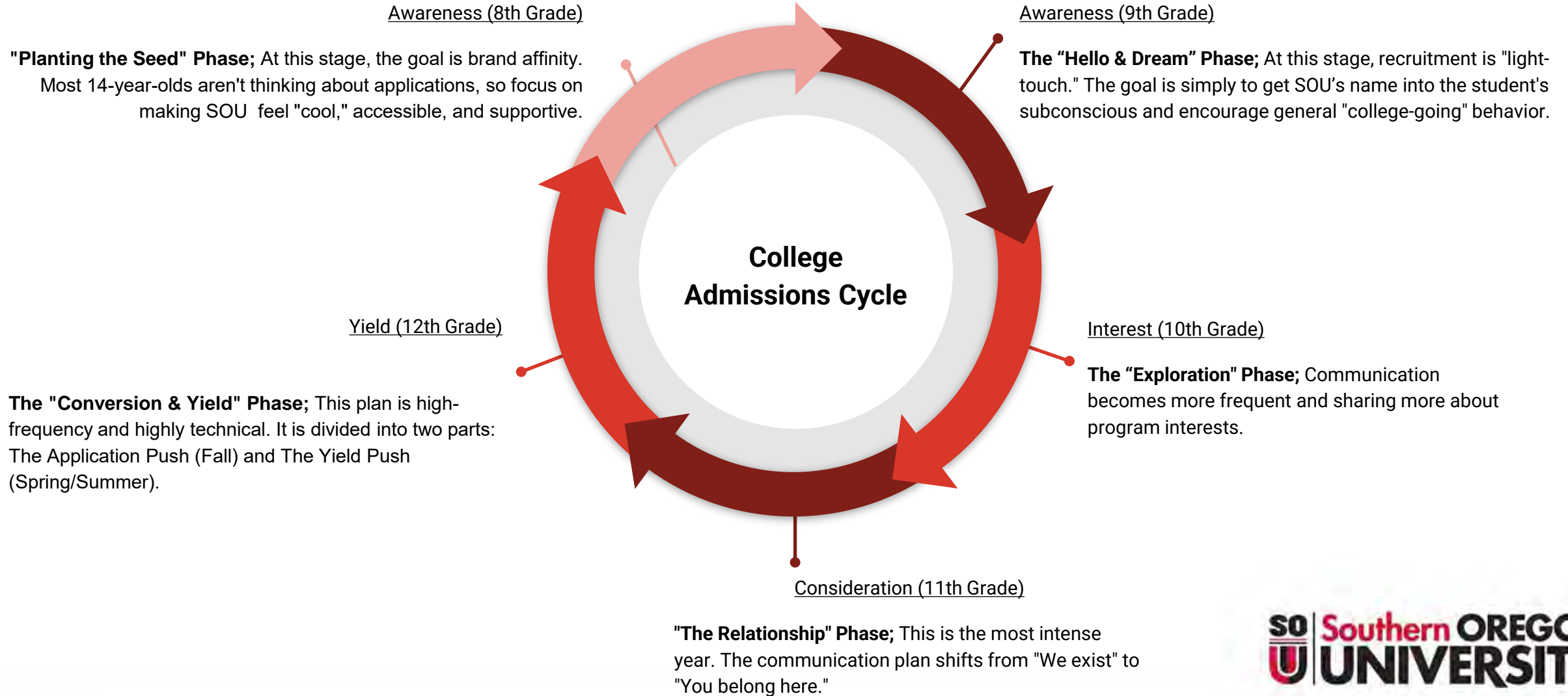
Strategy	Implementation for Regional Publics	Why it Works	Practice employed by SOU?
Direct Admissions	Partnering with local high schools to guarantee admission for all students above a specific GPA (e.g., 2.75).	Removes the "application barrier" and anxiety for rural and first-gen students.	Yes. Piloted regionally with Datashare partners.
Modern Marketing	Multi-dimensional; Responsive to each student's actions; Rapid; Hyper-Personalized; mobile-first	This approach to marketing that meets prospective students where they are, with messages tailored to their desires and needs, at the right moments.	Minimal.
Funnel Fluidity	AI Chatbots; Instant Credit evaluation; Text messaging; clear "Call to Action";	The harder it is to apply and get information, the more likely a student will drop out of the funnel (melt)	Yes. Workday should help to streamline even more.
Strategic Partnerships	K-12 Datashare; CC MOU's; Dual Enrollment; Employer alliances	Creation of pipelines and top of funnel awareness.	Yes. Have established regional partnerships with HS districts and CC colleges. More opportunity
Workforce Mapping	Highlighting local career outcomes and "Return on Investment" (ROI) in all marketing collateral.	Appeals to the "utilitarian" mindset of modern students who view college as a career-prep tool.	Yes and no. Opportunity to improve.



## Select Best Practices in Student Retention

Strategy	Implementation for Regional Publics	Why it Works	Practice employed by SOU?
Early Warning Systems	Using predictive analytics to identify "at-risk" behaviors (e.g., low LMS logins) by Week 3.	Allows for "intrusive" advising before a student's grade becomes unsalvageable.	Yes, Cares Notes, Attendance Reporting and Progress Reports.
Universal Design for Learning (UDL)	Providing multiple ways to consume content (video/text) and flexible assessment options (papers/presentations).	Reduces stigma and the "belonging gap" by making support standard rather than a special request for the 15% in DR.	Yes and No- some faculty have integrated UDL others have not.
The "First-Gen" Playbook	Explicitly teaching the "hidden curriculum" (e.g., how to use office hours or read a degree audit).	Reduces "culture shock" and imposter syndrome for students without family college experience.	Yes and No- some of this is covered in the Purposeful Learning sequence, some is covered through specialized programs (UCAM, Trio, Bridge, etc.)
Basic Needs Security	Integrating food pantries, emergency grants, and housing assistance into the student portal.	Financial/basic need emergencies are a top driver for withdrawal at regional public institutions.	Yes, Food Pantry, Emergency funding, and Benefits Navigator position (funded by the state)
On-Campus Employment	Prioritizing student jobs as a retention tool rather than just "labor."	Students who work on campus (up to 15 hours) persist at higher rates due to deeper institutional ties.	Yes and No- Some on-campus employment function as retention tool others are just a job.

# Recruitment Cycle



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# Questions?

# **Now, Next, Later: Actions for Enrollment Impact**



An aerial photograph of a university campus during autumn. In the center is a large, modern, two-story white building with a long horizontal window band. The building is surrounded by a green lawn and numerous trees with vibrant yellow, orange, and red foliage. In the background, there are evergreen trees and distant mountains under a blue sky with a bright sun creating a lens flare effect. The text "Now, Next, Later: Actions for Enrollment Impact" is overlaid in white on the lower left portion of the image.

# Now, Next, Later: Actions for Enrollment Impact





# Now

Project  
Architect

Future Ready  
Enrollment  
Plan

Academic  
Visioning

Brand  
“Refresh”



# Next

Continue to engage faculty, students, and staff in recruitment & retention

Build on enrollment and retention data to develop marketing strategy

Engage with Marketing Provider to maximize "top of funnel" input

Summer 2026 - launch marketing campaign

Assess FREP action plans for efficacy and impact



# Later

Assess Project  
Architect  
Outcomes

Implement  
Data-Informed  
Best Practices

Set Enrollment  
& Retention  
Goals for 2027



# Strategic Plan Updates



# **CELEBRATING 154 YEARS** **SOU STRATEGIC PLAN**

January 2026



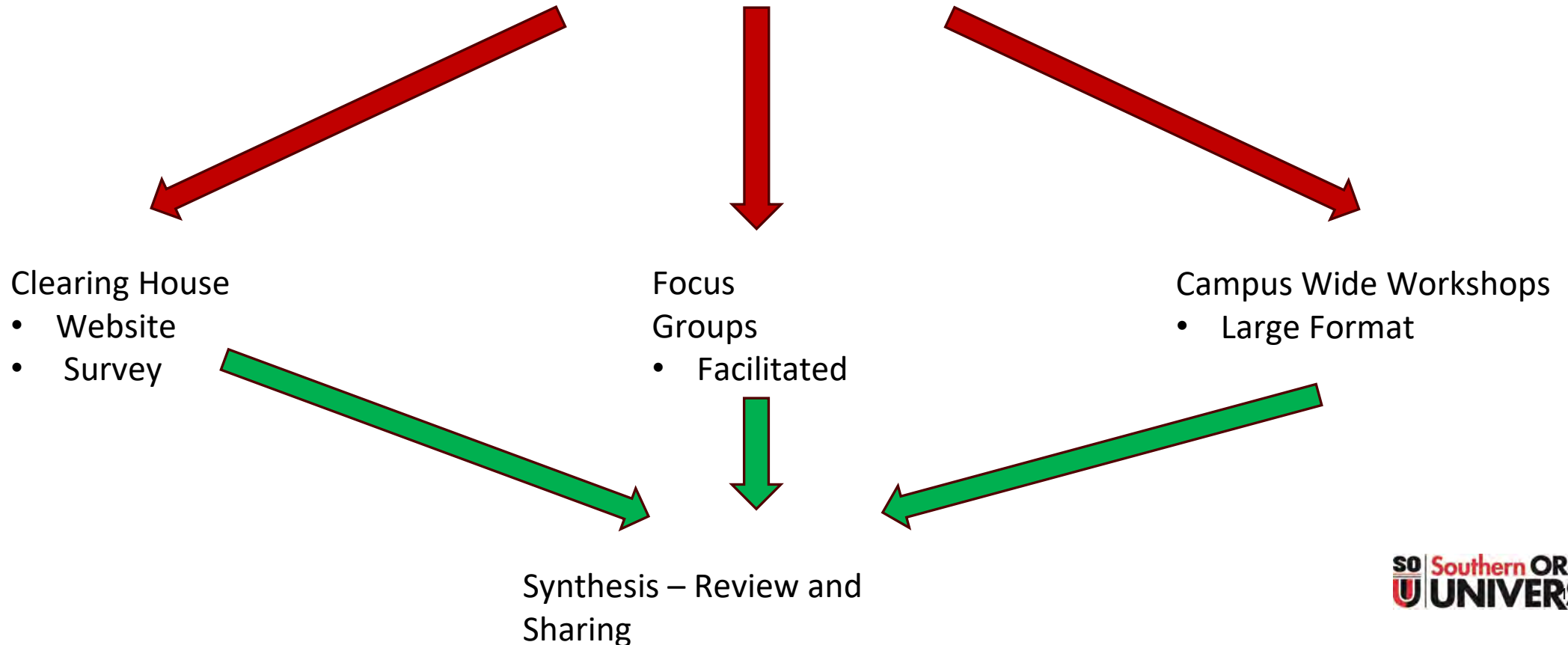
# **SOU** *Thrive*

**S**tudents thriving | **O**ur team thriving | **U**niversity thriving

# SOU STRATEGIC PLAN

**Current State (2025)**

**Future State (2028-2030)**



# SOU STRATEGIC PLAN

SOU THRIVE											
2025 to 2028	S: Students Thriving				O: Our Team Thriving			U: University Thriving			
	Objective 1a: Student Success	Objective 1b: Academic Engagement	Objective 1c: Basic Needs (Food, Housing, Financial Stability)	Objective 1d: Personal and Professional Development	Objective 2a: Compensation	Objective 2b: Workload Distribution	Objective 2c: Culture and Morale	Objective 3a: Enrollment	Objective 3b: Financial Stability	Objective 3c: Effective Financial Management	Objective 3d: Collaboration & Community (Stdnt/Fac/Stf)
	Workflows and KPIs										
Core Values	Integrity   Human-Centered   Sustainability   Accountability   Transparency										



# Thrive

2025 – 2028



Integrity | Student-Centered | Sustainability | Accountability | Transparency



# **SOU** *Thrive*

**S**tudents thriving | **O**ur team thriving | **U**niversity thriving



**THANK YOU!!!**

**Questions and  
Recommendations**



# Review of Employee Demographics and Data

## Human Resources Update

January 2026

This report provides an overview of SOU's workforce demographics, hiring activity, and employee retention over time. Where available, the analysis uses disaggregated and longitudinal data to support transparency, identify trends, and inform strategic planning.

### Workforce Overview

		2019	2020	2021	2022	2023	2024	2025
<b>Total Employees</b>	<b>Total Count</b>	882	773	804	779	756	739	686
	<b>% Change</b>		-12%	4%	-3%	-3%	-2%	-7%

		%	2025
<b>Employee Status</b>	<b>Full-Time</b>	67%	462
	<b>Part-Time</b>	33%	224
	<b>Regular</b>	66%	455
	<b>Temporary</b>	34%	231

		2025
<b>Employee Type</b>	<b>Faculty</b>	33%
	<b>Classified Staff</b>	24%
	<b>Unclassified Administrators &amp; Professionals</b>	43%

		% of Total Employees	% of Unclassified Staff	2025
<b>Leadership Representation / Management Level</b> <i>(Must supervise 2 or more employees)</i>	<b>President</b>			1
	<b>Vice President</b>			3
	<b>Assistant/Associate VP and Associate Provost</b>			5
	<b>Dean/Director</b>			34
	<b>Assistant/Associate Director</b>			12
	<b>Manager</b>			9
	<b>Total Leadership/Management</b>	<b>9%</b>	<b>21%</b>	<b>64</b>

## Demographic Composition

		2019	2020	2021	2022	2023	2024	2025
Residential Location	Oregon	98%	97%	95%	96%	96%	97%	95%
	Local (~45 minutes)	93%	92%	90%	91%	91%	91%	89%
	Outside of Oregon (16 States)	2%	3%	5%	4%	4%	3%	5%

2025 Local (~45 minutes)	Total	Ashland	Talent	Phoenix	Medford	Eagle Point	Jacksonville	Central Point	Rogue River	Gold Hill	Grants Pass
	89.3%	44.5%	8.0%	2.8%	22.0%	2.0%	1.9%	5.4%	0.7%	0.3%	1.7%

		2019	2020	2021	2022	2023	2024	2025
Gender	Male	47%	45%	45%	45%	46%	46%	45%
	Female	53%	55%	54%	54%	53%	52%	52%
	Not Disclosed	0%	0%	1%	1%	1%	2%	3%

		2019	2020	2021	2022	2023	2024	2025
Race and Ethnicity	American Indian or Alaska Native	1.0%	1.3%	1.9%	1.3%	1.1%	1.6%	1.9%
	Asian	3.5%	2.8%	3.7%	4.4%	3.3%	3.1%	3.5%
	Black or African American	2.2%	2.3%	1.9%	1.7%	2.0%	2.2%	2.2%
	Hispanic or Latino	4.6%	6.0%	5.5%	6.2%	7.3%	4.9%	5.5%
	Native Hawaiian or Other Pacific Islander	0.0%	0.1%	0.1%	0.3%	0.5%	0.5%	0.6%
	White	82.7%	82.1%	81.6%	79.5%	78.4%	76.9%	76.5%
	Two or More Races	2.4%	2.6%	2.7%	3.9%	4.0%	2.8%	1.9%
	Not Disclosed	3.6%	2.8%	2.6%	2.7%	3.4%	8.0%	7.9%

		2019	2020	2021	2022	2023	2024	2025
Veterans Status		2.27%	3.10%	3.23%	2.57%	2.65%	1.76%	5.69%

		2019	2020	2021	2022	2023	2024	2025
Disability Status		3%	3%	3%	7%	8%	14%	22%

		2019	2020	2021	2022	2023	2024	2025
Age	≤ 24	2%	2%	3%	4%	4%	5%	5%
	25 - 34	16%	15%	15%	15%	15%	17%	17%
	35 - 44	25%	25%	24%	23%	22%	22%	21%
	45 - 54	21%	21%	22%	23%	24%	24%	25%
	55 - 64	24%	25%	22%	22%	23%	21%	21%
	65+	12%	12%	14%	13%	12%	11%	11%

		< 1	1 - 5	6 - 10	11 - 15	16 - 25	26+
2025 Years of Service		12%	40%	19%	11%	11%	7%

2025 Average Full Retirement Age Eligibility		Years to Retirement	1 - 5	6 - 10	11 - 15	16 - 20	21+	Total
Program Tier	Normal Retirement Age		12%	12%	10%	14%	36%	84%
PERS Tier 1	58 (or 30 years of service)	Years Past Retirement Age	0 - 5	6 - 10	11 - 15	16+		Total
PERS Tier 2	60 (or 30 years of service)		9%	4%	2%	1%		16%
PERS/OPSRP	65 (or 58 with 30 years of service)							
ORP Tier 1	55							
ORP Tier 2	55							
ORP Tier 3	55							
ORP Tier 4	55							

## Hiring Activity

Open Positions	Faculty		5
	Faculty Pools		15
	Classified Staff		4
	Unclassified Administrators & Professionals		9
	Classified and Unclassified Staff Pools		10
	Student Employment		77
	<b>Total</b>		<b>120</b>

			2024	2025 Average Days	
2025 Time To Fill	Faculty	(300 days is typical. Fall search for following Fall hire)	10	1	300
	Classified Staff		35	11	90
	Unclassified Administrators & Professionals	(~89 days includes 21 days for advertising purposes)	26	23	88
	Student Employment	(39 days includes 14 days for advertising purposes)	293	296	39

		2019	2020	2021	2022	2023	2024	2025	% Applicants
Applicant Data Analytics (Excludes Student Employment)	Applicants	3089	1992	2126	2382	1605	3105	2521	
	Actual Hires	88	70	109	165	123	147	80	
	Male	38%	44%	41%	50%	43%	46%	40%	46%
	Female	62%	56%	59%	50%	54%	51%	56%	47%
	Not Disclosed	0%	0%	0%	0%	3%	3%	3%	7%
	American Indian or Alaskan Native	1%	4%	2%	2%	1%	3%	3%	3%
	Asian	6%	2%	6%	2%	1%	3%	5%	10%
	Black or African American	7%	4%	2%	4%	0%	2%	3%	7%
	Hispanic or Latino	5%	0%	1%	5%	5%	9%	1%	2%
	Native Hawaiian or Other Pacific Islander	0%	0%	2%	1%	2%	1%	4%	1%
	White	77%	83%	75%	82%	53%	68%	70%	59%
	Two or More Races	3%	3%	2%	2%	0%	2%	4%	1%
	Not Disclosed	1%	4%	10%	2%	38%	12%	10%	17%
	Veteran	0%	1%	3%	1%	4%	5%	4%	5%
	Disability	3%	1%	5%	8%	5%	13%	10%	14%

## Employee Retention

		2019	2020	2021	2022	2023	2024	2025
<b>Turnover</b> (Excludes Student Employment)	<b>Total</b>	<b>71</b>	<b>81</b>	<b>49</b>	<b>117</b>	<b>70</b>	<b>102</b>	<b>99</b>
	<b>Voluntary</b>	37	35	31	74	41	42	52
	<b>Involuntary</b>	1	7	0	7	12	15	16
	<b>Retirement</b>	9	19	11	21	8	17	5
	<b>End of Appt</b>	24	20	6	14	9	28	26
	<b>Death</b>	0	0	1	1	0	0	0
	<b>SOU Rate</b>	8.05%	10.48%	6.09%	15.02%	9.26%	13.80%	14.43%
	<b>College and Universities Professional Association Higher Education Average Rate</b>	12.00%	12.00%	12.00%	13.00%	16.00%	14.00%	13.40%
	<b>Comment</b>	Pre-Pandemic Little Variability	"Stay Phenomenon"		"Great Resignation"	SOU Forward Phase 1	SOU Forward Phase 2	SOU Resiliency Plan
	<b>Male</b>	41%	52%	45%	49%	37%	47%	45%
	<b>Female</b>	58%	48%	55%	51%	63%	53%	51%
	<b>Not Disclosed</b>	1%	0%	0%	0%	0%	0%	4%
	<b>American Indian or Alaskan Native</b>	3%	1%	0%	2%	1%	2%	1%
	<b>Asian</b>	3%	7%	0%	3%	6%	3%	3%
	<b>Black or African American</b>	4%	2%	4%	2%	1%	2%	1%
	<b>Hispanic or Latino</b>	3%	4%	10%	5%	3%	11%	6%
	<b>Native Hawaiian or Other Pacific Islander</b>	0%	0%	2%	0%	0%	2%	1%
	<b>White</b>	85%	81%	76%	84%	86%	75%	74%
	<b>Two or More Races</b>	1%	2%	6%	1%	1%	3%	8%
	<b>Not Disclosed</b>	1%	1%	2%	3%	1%	3%	6%
	<b>Veteran</b>	4.23%	1.23%	8.16%	1.71%	2.86%	1.96%	3.03%
	<b>Disability</b>	9.86%	0.00%	4.08%	4.27%	0.00%	13.73%	8.08%

<b>Recognition Programs</b>	
Distinguished Faculty Awards in Teaching, Scholarship, and Service	<a href="https://sou.edu/provost/">https://sou.edu/provost/</a>
Outstanding Staff Award	<a href="https://hrs.sou.edu/employee-resources/outstanding-staff-award-2/">https://hrs.sou.edu/employee-resources/outstanding-staff-award-2/</a>
Perks & Discounts	<a href="https://hrs.sou.edu/employee-resources/perks-discounts/">https://hrs.sou.edu/employee-resources/perks-discounts/</a>
Total Compensation Calculator (salary + paid time-off + benefits)	<a href="https://hrs.sou.edu/working-at-sou/search-jobs/total-compensation-calculator/">https://hrs.sou.edu/working-at-sou/search-jobs/total-compensation-calculator/</a>



# Human Resources Update

# Workforce Demographics

- Key Trends

- SOU has a strong local labor market, which benefits from community stability and lower commute-related turnover.
- Gender distribution is steady.
- Workforce Diversity: White representation declining, with modest gains across other groups.
- Disability disclosures increased (+8%) signaling improved reporting culture, changing workforce needs, and positive accommodation processing.
- Veteran disclosures increased (+3.9%) demonstrating quality training and compliance awareness.
- 24% of our workforce is eligible to retire within 10 years, and 16% are working and eligible to retire at anytime, illustrating longevity and strong institutional knowledge.

- Key Risks

- Mid-career-heavy workforce with fewer early-career upward mobility opportunities.
- Upcoming retirements create pressure around potential loss of institutional knowledge, leadership gaps, and succession planning.



# Hiring Activity

- Key Trends
  - Applicant volatility exists with applications peaking in 2024 (3105) and dropping in 2025 (2521).
  - Gender remains relatively balanced, and “Not Disclose” gaps are growing.
  - While White applicants remain the majority, they have declined from historical highs. There are increases in Asian applicants (10%), applicant Disability disclosures (14%), and applicant “Not Disclosed” race data (17%).
- Key Risks
  - Rising “Not Disclosed” rates across gender and race limit effectiveness in EDI monitoring and may raise reporting or compliance concerns.
  - 3 years of SOU Forward and Resiliency Plans may be impacting Applicant interest.

# Employee Retention

- Key Trends
  - Turnover increased significantly after 2020, peaking during the “Great Resignation” and remaining above pre-pandemic norms through 2025.
  - SOU Forward Phases 1 & 2 and the Resiliency Plan target stabilization, capacity rebuilding, and long-term sustainability.
  - Expanded recognition programs, total compensation transparency, and employee support initiatives focus on retention, belonging and engagement.
- Key Risks
  - Continued high voluntary turnover risks institutional knowledge loss, higher recruitment costs, and operational strain.
  - Involuntary turnover and restructuring periods may impact existing employee engagement and service continuity.

# SOU Campus Culture Survey Results

A photograph of a Southern Oregon University campus. In the foreground, a low stone wall with the words "SOUTHERN OREGON UNIVERSITY" carved into it sits on a grassy area. Behind the wall, a large tree with bright yellow autumn leaves stands prominently. Other trees and greenery are visible in the background under a clear sky.

# A Holistic Assessment of SOU Campus Climate: Employees

Dr. Sarah Olejniczak, Director of Equity Grievance and Title IX Coordinator  
Dr. Carrie Vath, Assistant Vice President of Student Affairs and Dean of Students

# Agenda

## ❖ **Assessment Overview**

- Methodology and scope of the GRS Community Health & Benchworks Climate surveys.

## ❖ **Executive Summaries**

- High-level snapshots of the current institutional state.

## ❖ **Key Findings & Recommendations**

- Detailed analysis of categorical trends and targeted areas for improvement.

## ❖ **Strategic Alignment**

- Synthesis of overlapping outcomes and unified recommendations.

## ❖ **The Path Forward**

- Tangible next steps and milestones for institutional improvement.

## ❖ **Discussion & Inquiry**

- Closing remarks and Q&A.

**Note:** Selected data figures and tables are available in the **Technical Appendix** following the presentation.



# Methodology & Scope: A Tale of Two Instruments

## Grand River Solutions: "Access, Culture & Community"

- **Primary Focus:** Campus culture, prevalence of discrimination, reporting, access, and knowledge of policy and resources
- **What it looks at:** This tool is designed by compliance, equity, and Title IX experts to measure how safe and inclusive a campus is. It focuses heavily on **prevalence of discrimination**, knowledge of policies, reporting procedures, and **institutional accountability**.
- **The GRS "Lens":** It views the campus through a lens of **risk and responsibility**. It assesses areas of improvement, generates actionable insights, and helps institutions build on strengths.
- **Response Rate:** 51%
- **Administered:** May 2025
- **Frequency:** First time

## Benchworks: "Campus Climate & Satisfaction"

- **Primary Focus:** The day-to-day experience and satisfaction of the workforce..
- **What it looks at:** This tool is built on longitudinal benchmarking. It measures **work-life balance**, satisfaction with resources, perceptions of leadership, and the "vibrancy" of campus life.
- **The Benchworks "Lens":** It views the campus through a lens of **operational health and retention**. It asks: *What is the quality of life here? Are the "mechanics" of the university (workload, pay, connection) functioning well enough for people to stay and thrive?*
- **Response Rate:** 47%
- **Administered:** March 2025
- **Frequency:** Second time (First closed March 16, 2020, Response Rate was 43%)

*NOTE: Both of these occurred BEFORE the SOU Resiliency Plan and the 2020 Benchworks survey occurred right before the Covid-19 pandemic*



## Executive Summary

### Workplace connectedness

On average, employees slightly agreed that there are peers and leaders at Southern Oregon University who represent them, and that it is important to have coworkers, supervisors, and leaders who represent them. Respondents also slightly agreed that all employees are treated equitably. Perceptions of belonging, equity, and representation varied across some demographic groups.

### Workplace climate

On average, employees slightly agreed that Southern Oregon University encourages diversity and fosters a workplace that makes employees comfortable to be themselves. Most employees disagreed or strongly disagreed that it is common for fellow employees or school leadership to make insensitive or inappropriate comments.

### Knowledge of campus resources

Eighty-five percent (85%) of employees indicated that they knew where to get help if they or a coworker experienced discrimination or harassment, and 64% understood what happens when an employee reports discrimination and/or harassment.

### Discrimination and harassment

Overall, 80% of employees indicated that they experienced discrimination, harassment, and/or mistreatment at least once. Of those who experienced an incident of discrimination or harassment, 55% reported that the incident impacted their career or work environment. Experience of discrimination, harassment, and/or mistreatment varied across some demographic groups.

### Reporting

The majority of participants who experienced discrimination, harassment, and/or mistreatment did not report the incident to campus officials. The most common reasons why employees did not report these incidents were because they did not want the report to impact their job or career, were worried about potential retaliation, and they did not trust the report would be taken seriously.

# Executive Summary Benchworks

## Institutional Culture and Inclusion

Overall, employees at Southern Oregon University rated the institution **more positively than peer institutions** within its Carnegie Classification and across all institutions participating in the Benchworks Employee Climate Survey in key areas related to institutional culture. Employees reported that SOU is welcoming, respectful, and encourages free and open discussion. Respondents also indicated that the institution fosters inclusion and encourages employees to share their ideas. While SOU also scored higher than peers in the 2019/2020 survey, the margin of difference in 2024/2025 was more pronounced, suggesting continued progress in institutional culture and employee voice.

## Equity and Fairness in the Campus Environment

SOU scored **higher than both Carnegie peers and all participating institutions** on measures related to equitable treatment across personal and social identities, including age, ability, gender, race, religion/faith, sexual orientation, socioeconomic status, and political ideology. Notably, this represents an improvement from the 2019/2020 survey, when SOU scored below comparison groups in areas related to political ideology, race, and religion/faith. These findings suggest meaningful gains in perceptions of fairness and equity across the campus environment over time.

## Work Environment and Supervisory Relationships

Perceptions of the work environment at SOU were **generally higher than or on par with comparison institutions**, particularly in areas related to supervisory respect and day-to-day working relationships. Employees reported that supervisors treat them with respect at rates comparable to peer institutions. While supervisory scores were slightly stronger in the 2019/2020 survey, overall results continue to indicate that immediate work environments and supervisory interactions are a relative strength for the institution.

## Representation, Safety, and Accessibility

Employees rated SOU **lower than both Carnegie peers and all participating institutions** in areas related to visibility, campus safety, and accessibility. Respondents expressed concerns about the visibility of students, faculty, staff, and senior leadership from diverse backgrounds—findings that are consistent with 2019/2020 results. Perceptions of campus safety were also lower than comparison groups, particularly regarding safety at night and adequacy of outdoor lighting. While these two areas remained unchanged from the previous survey, employees reported improvements in other campus safety measures in 2024/2025. Accessibility scores were lower in areas related to ease of navigating campus websites, sidewalks, and administrative buildings. These findings are similar to 2019/2020 results; however, lower scores related to classrooms and offices may reflect lingering impacts of COVID-19-era disruptions and facility use changes.

## Belonging, Engagement, and Openness to Diverse Perspectives

Employees expressed **neutral perceptions** regarding overall satisfaction with the work environment and sense of belonging at SOU. However, SOU scored significantly lower than peer institutions on employees' willingness to recommend the university as a place to work to a close friend—a notable decline from the 2019/2020 survey. Additionally, employees reported lower levels of engagement in discussions with individuals whose ideas and values differ from their own, suggesting limited exposure to diverse perspectives and a potential perception of SOU as an “echo chamber.” These results are consistent with prior survey findings and point to an ongoing opportunity to strengthen cross-perspective dialogue and institutional engagement.

### Key Findings

#### **There are opportunities for improving perceptions of belonging, equity, culture, representation, and prevention.**

Employees only slightly agreed with statements in these categories, and some groups had less positive perceptions than others.

pg. [12](#), [13](#), [14](#), [15](#), [16](#)

### Recommendations

1. Consider holding a forum or fora to better understand perceptions about representation and how the University, while following all laws and protocols, can build a workforce in which employees feel represented and able to succeed at equitable levels.
2. Continue to provide opportunities for employees to engage across differences and identities. Consider multiple approaches through intergroup dialogue or planned professional development to continue enhancing engagement.
3. Train supervisors on how to develop equitable performance management, goal, and review processes for their teams.

### Key Findings

#### **While a majority of employees knew where to get help and what happens when a report is made, most who experienced an incident did not report it.**

Among those who did not report, there was concern that reporting would impact their career, employees would face retaliation, and that the issue would not be taken seriously.

pg. [19](#), [29](#), [30](#)

### Recommendations

1. Train faculty and staff on reporting obligations related to discrimination and harassment. Consider sending a bi-annual reminder to all employees about these obligations.
2. Continue creating a yearly report of aggregated statistics related to bias and discrimination disclosures and outcomes.
3. Continue to ensure response staff are trained regularly on trauma-informed interventions.
4. Enhance information regarding protections against retaliation in reporting processes and resources, as appropriate.

### Key Findings

#### **80% of participants experienced discrimination, harassment, or mistreatment.**

54% experienced incidents once or twice, and 26% many times in the past year.

Among those, 36% considered resigning.

100% of TGQN employees and 94% of LGB+ employees expressed that they had experienced discrimination or harassment in the past year.

pg. [25](#), [26](#), [32](#)

### Recommendations

1. Consider holding focus groups with employees to understand the nature of the discrimination, harassment, and/or mistreatment. Devise a plan to address the concerns raised during the focus groups.
2. Increase education for the campus community about opportunities for informal and formal resolution. Explore additional prevention training opportunities.
3. Continue to provide professional development opportunities with skill building for employees to learn about implicit bias, microaggressions, and how they may be causing harm and impacting others.

## 2020 Recommendations

Factor	Regression Variables		Impact on Overall Perceptions		Performance of Factors	
	R <sup>2</sup>	ΔR <sup>2</sup>	Value	Description	Mean	Description
<b>Top Priority</b>						
Factor 1. Perceptions of Institution	0.118	0.118	4.86	Moderate Impact	5.35	Good
Factor 9. Administrative Policies**	0.334	0.099	4.69	Moderate Impact	5.28	Good
Factor 2. Campus Environment	0.428	0.094	4.64	Moderate Impact	5.33	Good
Factor 11. Campus Safety	0.514	0.086	4.55	Moderate Impact	5.30	Good
Factor 8. Perceptions of Administration	0.599	0.085	4.53	Moderate Impact	4.52	Fair
Factor 3. Visibility	0.708	0.053	4.07	Moderate Impact	4.43	Fair
<b>Maintain or Improve</b>						
Factor 4. Work Environment	0.235	0.117	4.86	Moderate Impact	5.99	Excellent
Factor 13. Institutional Response to Sexual Assault	0.655	0.056	4.11	Moderate Impact	5.76	Excellent
<b>Maintain</b>						
Factor 6. Perceptions of Staff	0.000	0.000	0.00	No Impact	5.62	Good
Factor 7. Perceptions of Students	0.000	0.000	0.00	No Impact	5.73	Excellent
Factor 12. Individual Response to Sexual Assault	0.000	0.000	0.00	No Impact	6.06	Excellent
Factor 14. Personal Attitudes and Behaviors	0.000	0.000	0.00	No Impact	6.56	Excellent
<b>Monitor</b>						
Factor 5. Perceptions of Faculty	0.000	0.000	0.00	No Impact	5.34	Good

## 2025 Recommendations

Factor	Regression Variables		Impact on Overall Perceptions		Performance of Factors	
	R <sup>2</sup>	ΔR <sup>2</sup>	Value	Description	Mean	Description
<b>Top Priority</b>						
Factor 8. Perceptions of Administration	0.219	0.219	5.48	High Impact	5.04	Good
<b>Maintain or Improve</b>						
Factor 1. Perceptions of Institution	0.424	0.205	5.42	High Impact	5.59	Good
Factor 12. Individual Response to Sexual Assault**	0.549	0.125	4.92	Moderate Impact	5.97	Excellent
Factor 4. Work Environment	0.666	0.117	4.85	Moderate Impact	6.21	Excellent
<b>Maintain</b>						
Factor 2. Campus Environment	0.000	0.000	0.00	No Impact	5.66	Excellent
Factor 6. Perceptions of Staff	0.000	0.000	0.00	No Impact	5.73	Excellent
Factor 7. Perceptions of Students	0.000	0.000	0.00	No Impact	5.86	Excellent
Factor 13. Institutional Response to Sexual Assault	0.000	0.000	0.00	No Impact	5.82	Excellent
Factor 14. Personal Attitudes and Behaviors	0.000	0.000	0.00	No Impact	6.59	Excellent
<b>Monitor</b>						
Factor 3. Visibility	0.000	0.000	0.00	No Impact	4.56	Good
Factor 5. Perceptions of Faculty	0.000	0.000	0.00	No Impact	5.49	Good
Factor 9. Administrative Policies	0.000	0.000	0.00	No Impact	5.40	Good
Factor 11. Campus Safety	0.000	0.000	0.00	No Impact	5.38	Good

The transition between the 2020 and 2025 surveys reveals a significant shift in what the SOU community considers "urgent." Although some goals (like diversity and breaking silos) are evergreen, the center of gravity for campus priorities has moved from social and ideological refinement to institutional and personal survival.

**Key Takeaway:** In five years, the SOU community has moved from a place of wanting to "perfect" its campus culture to a place of needing to "stabilize" its environment. The 2025 priorities suggest a workforce that feels it can no longer afford the luxury of ideological debate until the basic issues of workload, pay, and institutional stability are resolved.

# What do the two instruments reveal?

- A compliance-focused tool (GRS) and a satisfaction-focused tool (Benchworks) both highlight similar issues.
  - It means these aren't just "feelings" or anecdotal complaints—they are documented institutional trends that are being captured by two entirely different methodologies.
  - The GRS survey considers the *policy and equity* risk, while Benchworks considers the *human and operational* cost.
- Overlapping themes:
  - Workload - Consider functional exhaustion, DEI Burnout, job security
  - Communication - Examine communication flow and delivery
  - Structural Accountability - Develop trust in processes, concern for retaliation, knowledge of resources, and understanding of reporting
  - Community - Build sense of belonging



## Benchworks Recommendations:

- 1. Address "Staffing Crisis" and Workload Injustice:** A recurring and urgent theme, especially in the 2025 data, is that staff are being "worked to death" due to high turnover and unfilled positions.  
**Tangible Step:** Conduct a campus-wide workload audit to identify departments where employees are performing the duties of multiple roles and prioritize rehiring for vacated positions to redistribute the burden.
- 1. Implement Structural Accountability for Leadership:** Respondents frequently mentioned a "top-heavy" administration and a lack of accountability for managers who oversee toxic environments.  
**Tangible Step:** Establish a formal, 360-degree feedback mechanism where staff can safely report on management culture and ensure that underperforming or abusive managers are held accountable rather than simply being transferred to other departments
- 1. Move DEI from "Performative" to "Mechanical":** While SOU is seen as inclusive in theory, many feel the actual hiring processes and resource allocations do not reflect these values.  
**Tangible Step:** Mandate "rigorous training" for all search committees on how to successfully recruit and retain diverse faculty and staff, and move beyond workshops to direct investments in hiring professionals of color for non-menial roles.
- 1. Foster "Organic" Community and Break Down Silos:** Many employees feel isolated within their departments and desire more "human-level" connection that isn't forced or purely professional.  
**Tangible Step:** Fund regular, low-pressure social gatherings (such as departmental mixers or campus-wide BBQs) that allow faculty, staff, and administration to mingle as equals and understand each other's day-to-day struggles.
- 1. Radical Transparency in Communication:** There is a profound sense of "uncertainty" and "fear" regarding the university's fiscal health and the "SOU Forward" plan.  
**Tangible Step:** Move away from assuming that information shared in high-level committees (like the Senate) "trickles down". Implement short, direct weekly email updates from senior leadership that transparently acknowledge fiscal challenges and provide clear, simple explanations of institutional plans.



# Questions?

# Appendix: Technical Data

## Campus Culture narrative description (2020 vs. 2025)

Theme	2020	2025	Nature of Change
<b>Ideological Climate</b>	"Very liberal" / "Far-left"	Remains "Very liberal"	Similarity: Consistent silencing of dissenting views.
<b>Primary Anxiety</b>	Identity & Social Justice	Fiscal Survival	Shift: From "Identity Politics" to "University Viability."
<b>Labor &amp; Staffing</b>	Admin Burden (Clerical)	Burnout & Turnover	Shift: From task-load to systemic "workplace injustice."
<b>DEI Efforts</b>	Aspirational "Lip Service"	Aspirational "Lip Service"	Similarity: Lack of perceived structural change.
<b>Leadership</b>	Inconsistent "Spaghetti"	Mission-driven but "Empty"	Shift: Better intent, but viewed as "nebulous."
<b>Campus Life</b>	Active but siloed	"Quiet" or "Dead"	Shift: Loss of vibrancy and student activity.
<b>Admin Relations</b>	Top-heavy disconnect	Top-heavy disconnect	Similarity: Persistent communication silo.
<b>Community Feel</b>	Warm and Friendly	Warm and Friendly	Similarity: High interpersonal warmth remains.
<b>External Focus</b>	Internal Social Dynamics	National Economic Pressure	Shift: Fear for "Academic Freedom" and the economy.

## Campus Improvement narrative suggestions (2020 vs. 2025)

Strategic Action Area	Constant Needs (Similarities)	2020 Specific Focus	2025 Specific Focus
<b>Diversity &amp; Inclusion</b>	Hire/retain faculty of color; improve DEI training.	Personal: Awareness of privilege, fragility, and microaggressions.	Structural: Rigorous search committee training and hiring mechanics.
<b>Operational Health</b>	Reduce silos; increase transparency.	Interpersonal: Improving "civility" and "mindfulness."	Functional: Fixing "archaic policies" and broken business procedures.
<b>Staffing &amp; Workload</b>	Address staff being "stretched thin."	Pacing: General calls to "slow down" and acknowledge the load.	Survival: Crisis-level calls to increase staffing to prevent "working to death."
<b>Leadership &amp; Admin</b>	Increase communication and presence.	Visibility: Admins should "mingle" and visit programs more.	Accountability: Address underperforming managers and "peer accountability."
<b>Community &amp; Vitality</b>	Build organic culture; more informal gatherings.	Culture: Focus on campus safety and "ethnic food" options.	Well-being: Focus on COLAs (Cost of Living) and "SOU Forward" impacts.

## Perceptions of Belonging, Equity, and Representation

Employees were asked to what extent they agreed or disagreed with statements about their feelings of belonging, equity, and representation. Their responses were scored on a scale from 1 to 4, with 4 being a positive response.

### Belonging

On average, most employees **slightly agreed** that there are peers and leaders who are similar to them at Southern Oregon University.

### Equity

On average, most employees **slightly agreed** that they have equitable opportunities for professional success, their hard work is valued equally compared to their peers, and that employees of different backgrounds are treated fairly.

### Representation

On average, most employees **slightly agreed** that it is important for them to have coworkers, supervisors, and leaders at the University who represent them.

2.9 /4  
Belonging

2.9 /4  
Equity

2.7 /4  
Representation

1 = negative response

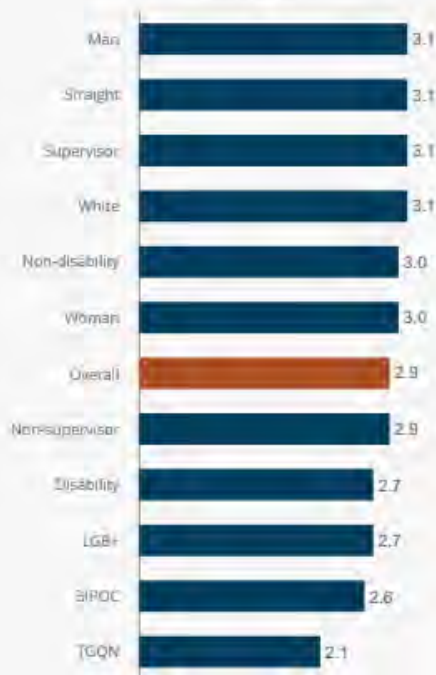
4 = positive response

## Differences in Perceptions of Belonging

Perceptions of belonging varied across demographic groups.

- TGQN employees reported a lower sense of belonging than women and men
- BIPOC employees reported a lower sense of belonging than White employees
- LGB+ employees reported a lower sense of belonging than straight employees
- Employees with disabilities reported a lower sense of belonging than employees without disabilities
- Employees who are not supervisors reported a lower sense of belonging than employees who are supervisors

Fig. 13 Differences in perceptions of belonging



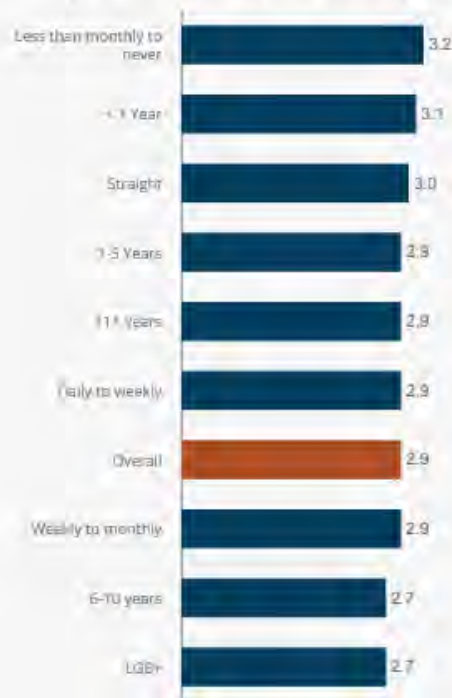


## Differences in Perceptions of Equity

Perceptions of equity varied across demographic groups.

- LGB+ employees reported a lower sense of equity than straight employees
- Those employed for 6-10 years reported a lower sense of equity than those employed for less than five years or more than 11 years
- Those employed for 1-5 years and more than 11 years reported a lower sense of equity than those employed for less than one year
- Employees who interact with students daily to weekly or weekly to monthly reported a lower sense of equity than employees who interact with students less than monthly or never

Fig. 14 Differences in perceptions of equity



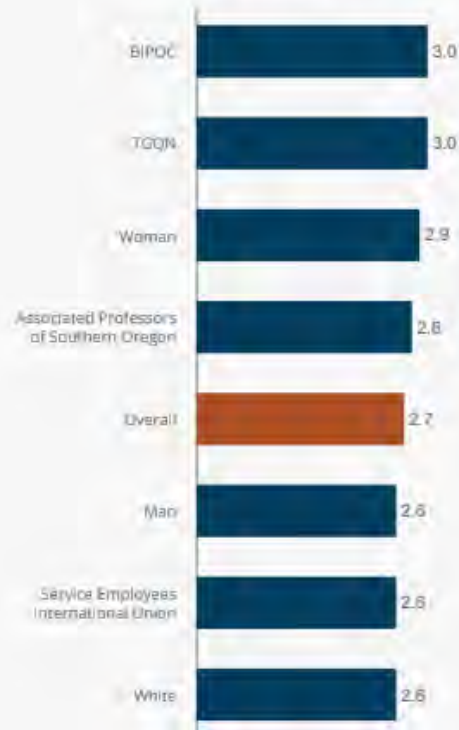
## Differences in Perceptions of Representation

Perceptions of the importance of representation varied across demographic groups.

Groups who were more likely to agree that it is important for them to have coworkers, supervisors, and leaders at the University who represent them include:

- BIPOC employees
- Women and TGQN employees
- Employees in the Associated Professors of Southern Oregon

Fig. 15 Differences in importance of representation



## Comfort with Expressing Differing Opinions

Employees were also asked about how comfortable they felt expressing a differing opinion than their colleagues.

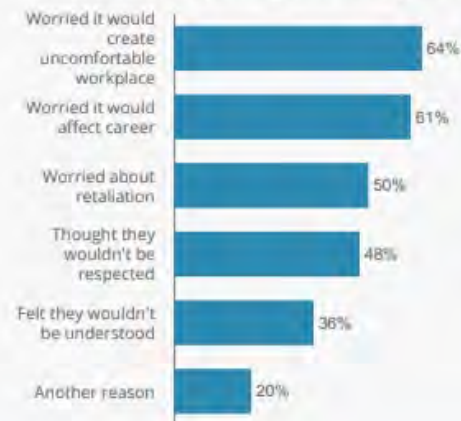
Employees reported feeling most comfortable expressing a differing opinion than **their coworkers** (90%), followed by **their supervisor** (81%) and **leadership** (67%).

The most common reasons why employees reported feeling uncomfortable expressing a differing opinion were because they **were worried it would create an uncomfortable workplace** (64%) and they **were worried it would affect their career** (61%).

Fig. 21 I feel comfortable expressing a differing opinion than



Fig. 22 Reasons employees felt uncomfortable expressing a differing opinion



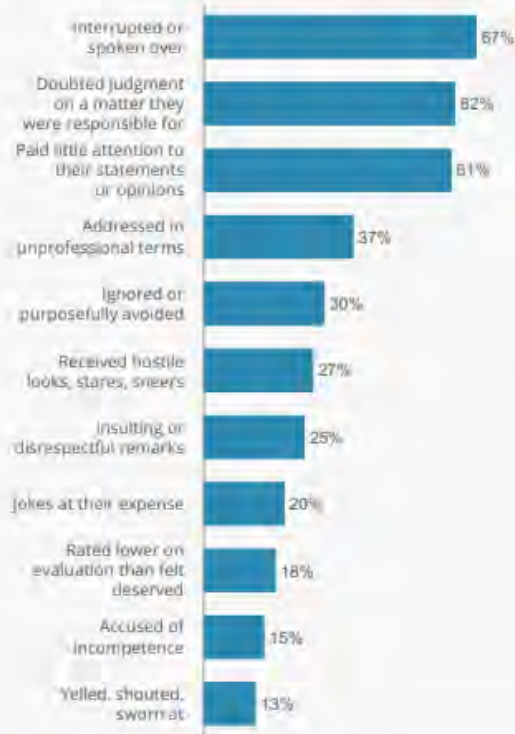
## 80% of Employees Experienced Discrimination, Harassment, or Mistreatment

The survey asked employees about their experiences of discrimination, harassment, and mistreatment at Southern Oregon University in the past 12 months. Overall, **80%** of employees indicated that they experienced discrimination, harassment, and/or mistreatment at least once.

Fifty-four percent (54%) of employees surveyed experienced discrimination, harassment, and/or mistreatment 'once or twice' or 'sometimes' and 26% experienced it 'often' or 'many times.'

The highest percentage of employees reported that someone had interrupted or spoken over them (67%), doubted their judgment on a matter over which they had responsibility (62%), and paid little attention to their statements or opinions (61%).

Fig. 23 Prevalence of discrimination, harassment, and mistreatment

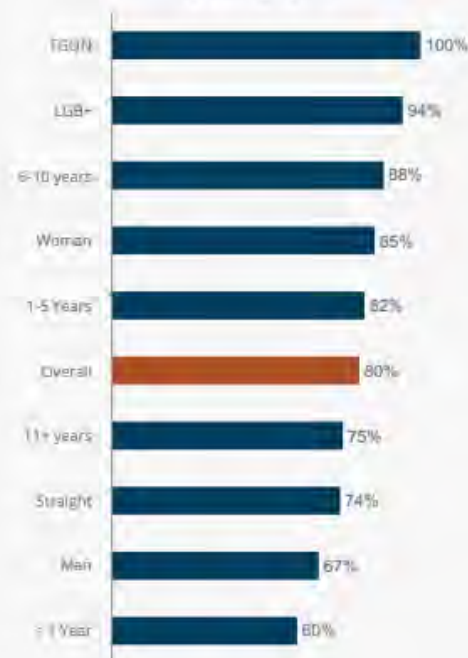


## Differences in Experience of Discrimination, Harassment, and Mistreatment

The prevalence of discrimination, harassment, and/or mistreatment varied among demographic groups.

- TGQN employees were more likely to experience discrimination and/or harassment than women and men
- LGB+ employees were more likely to experience discrimination and/or harassment than straight employees
- Those employed 1-10 years were more likely to experience discrimination and/or harassment than those employed less than one year or more than 11 years
- Women were more likely to experience discrimination and/or harassment than men

Fig. 24 Prevalence of discrimination, harassment, and mistreatment by demographics



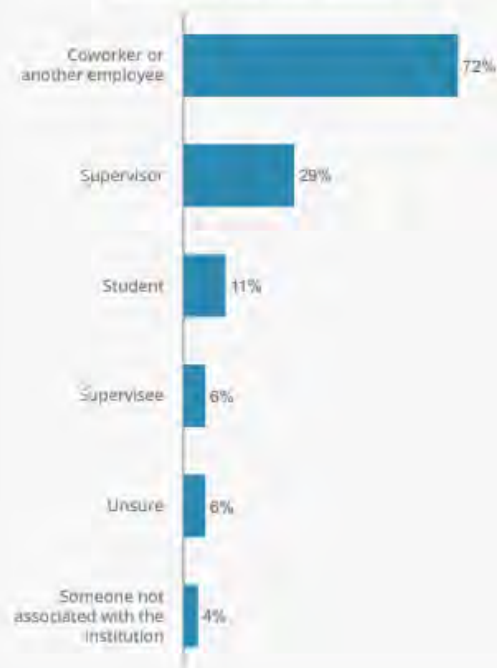


## Perpetrators of Discrimination, Harassment, and Mistreatment

Employees who indicated experiencing mistreatment, discrimination, and/or harassment in the past year were asked what their relationship was with the person(s) who engaged in that behavior.

The highest percentage of employees indicated that the perpetrator was **a coworker, colleague, or another employee** (72%), and 29% said that the perpetrator was a **supervisor**.

Fig. 25 Perpetration of discrimination, harassment, and mistreatment



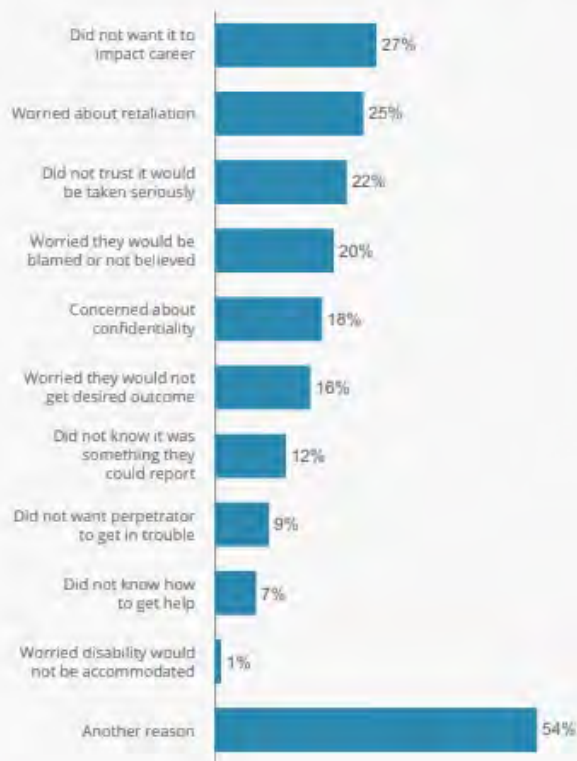


## Reasons Employees Did Not Report

Employees who indicated experiencing mistreatment, discrimination and harassment but did not report it were asked about reasons they did not contact someone at Southern Oregon University about the incident.

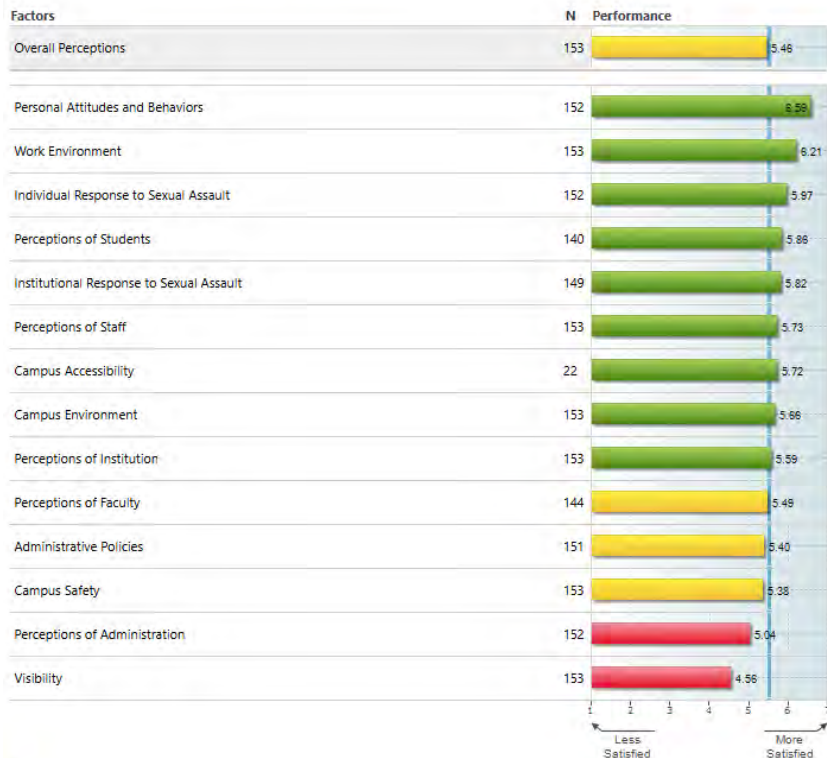
The most common reason why employees did not report the incident was because they **did not want the report to impact their job or career** (27%). Employees also **were worried about potential retaliation** (25%) and **did not trust the report would be taken seriously** (22%).

Fig. 27 Reasons participants did not report discrimination, harassment, and/or mistreatment






## With which aspects of the experience are Southern Oregon University faculty/staff most and least satisfied?




Population: Southern Oregon University (Number Responding = 153)






### Top Priority

Factors	Recommendations	Rationale For Recommendations
 <ul style="list-style-type: none"> <li>Perceptions of Administration</li> </ul>	Increase efforts (e.g. personnel, fiscal, time, focus) in these areas	Performance on these factors is below goal value and improvement of these factors should impact Overall Perceptions.
		 Impact  Performance




### Maintain or Improve

Factors	Recommendations	Rationale For Recommendations
 <ul style="list-style-type: none"> <li>Perceptions of Institution</li> <li>Individual Response to Sexual Assault **</li> <li>Work Environment</li> </ul>	Maintain current efforts (e.g. personnel, fiscal, time, focus) in these areas	Maintaining the current level of performance on these factors is desired since these factors have high impact on Overall Perceptions. However, further improvement will be difficult since current performance is already excellent.
		 Impact  Performance

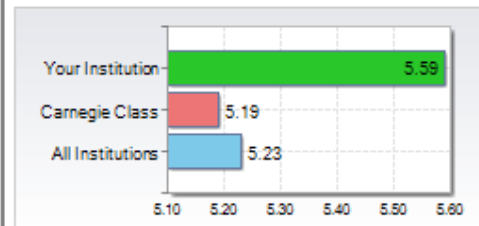
### Maintain

Factors	Recommendations	Rationale For Recommendations
 <ul style="list-style-type: none"> <li>Campus Environment</li> <li>Perceptions of Staff</li> <li>Perceptions of Students</li> <li>Institutional Response to Sexual Assault</li> <li>Personal Attitudes and Behaviors</li> </ul>	Consider reducing current efforts (e.g. personnel, fiscal, time, focus) in these areas	If possible, consider reallocating some efforts from these areas to the Top Priority areas. Maintaining high levels of performance for these factors that have little to no impact on Overall Perceptions may be unnecessary.
		 Impact  Performance

### Monitor

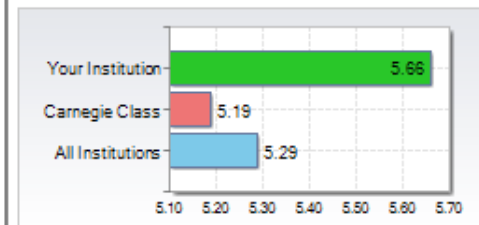
Factors	Recommendations	Rationale For Recommendations
 <ul style="list-style-type: none"> <li>Visibility</li> <li>Perceptions of Faculty</li> <li>Administrative Policies</li> <li>Campus Safety</li> </ul>	Monitor efforts (e.g. personnel, fiscal, time, focus) in these areas	Carefully monitor performance in these areas and reallocate some efforts to the Top Priority areas, if possible. While these factors are low performing, they have little if any impact on Overall Perceptions.
		 Impact  Performance

## Factor 1. Perceptions of Institution



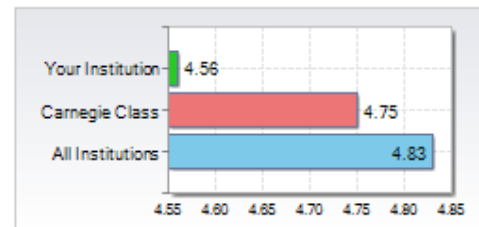
	N	Mean	Std Dev				
Your Institution	153	5.59	1.23				
	N	Mean	Std Dev	Min	Max	Difference	Rank
Carnegie Class	2788	5.19	1.40	5.04	5.72	<b>0.40</b>	2 of 6
All Institutions	6344	5.23	1.41	4.41	5.82	<b>0.36</b>	4 of 16

## Factor 2. Campus Environment



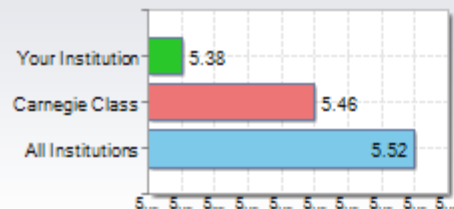
	N	Mean	Std Dev				
Your Institution	153	5.66	1.12				
	N	Mean	Std Dev	Min	Max	Difference	Rank
Carnegie Class	2772	5.19	1.45	5.05	5.97	<b>0.47</b>	2 of 6
All Institutions	6304	5.29	1.44	4.87	5.97	<b>0.37</b>	5 of 16

## Factor 3. Visibility



	N	Mean	Std Dev				
Your Institution	153	4.56	1.22				
	N	Mean	Std Dev	Min	Max	Difference	Rank
Carnegie Class	2791	4.75	1.56	4.35	5.75	<b>-0.19</b>	5 of 6
All Institutions	6342	4.83	1.53	4.28	5.75	<b>-0.27</b>	12 of 16

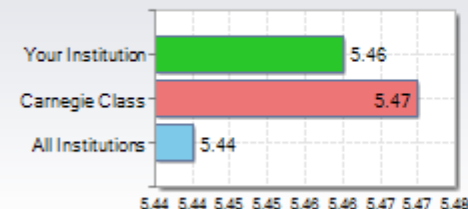
## Factor 11. Campus Safety



	N	Mean	Std Dev
Your Institution	153	5.38	1.12

	N	Mean	Std Dev	Min	Max	Difference	Rank
Carnegie Class	2768	5.46	1.25	5.37	5.83	-0.08	5 of 6
All Institutions	6275	5.52	1.22	4.93	5.83	-0.14	13 of 16

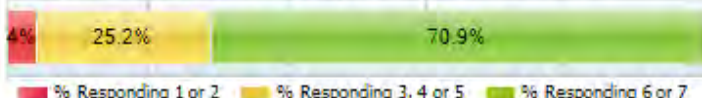
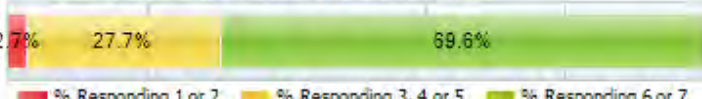
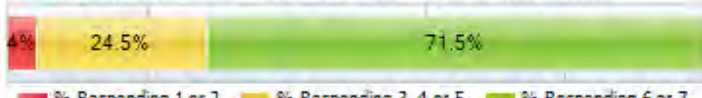
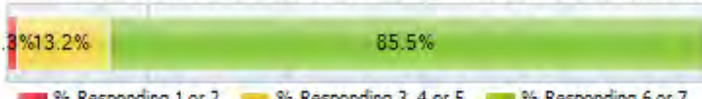
## Factor 15. Overall Perceptions



	N	Mean	Std Dev
Your Institution	153	5.46	1.36

	N	Mean	Std Dev	Min	Max	Difference	Rank
Carnegie Class	2781	5.47	1.51	5.34	6.02	-0.01	4 of 6
All Institutions	6322	5.44	1.53	4.44	6.02	0.02	9 of 16



	Mean	Std Dev	N	% Responding
<b>Factor 12 . Individual Response to Sexual Assault</b>	5.97	1.11	152	99.4 %
Q064. Sexual Assault - To what extent do you agree with the following statements? I understand Southern Oregon University's formal procedures to address complaints of sexual assault.				
				
<div><div></div> % Responding 1 or 2</div> <div><div></div> % Responding 3, 4 or 5</div> <div><div></div> % Responding 6 or 7</div>				
Key Text	N (%N)			% Resp = 98.7%
(1) Strongly disagree	4 (2.6%)			N = 151
(2)	2 (1.3%)			Mean = 5.84
(3)	6 (4%)			Std Dev = 1.40
(4) Neutral	7 (4.6%)			
(5)	25 (16.6%)			
(6)	46 (30.5%)			
(7) Strongly agree	61 (40.4%)			
Q065. Sexual Assault - To what extent do you agree with the following statements? I know where to get help at Southern Oregon University in the event of a sexual assault.				
				
<div><div></div> % Responding 1 or 2</div> <div><div></div> % Responding 3, 4 or 5</div> <div><div></div> % Responding 6 or 7</div>				
Key Text	N (%N)			% Resp = 96.7%
(1) Strongly disagree	2 (1.4%)			N = 148
(2)	2 (1.4%)			Mean = 5.88
(3)	6 (4.1%)			Std Dev = 1.30
(4) Neutral	7 (4.7%)			
(5)	28 (18.9%)			
(6)	43 (29.1%)			
(7) Strongly agree	60 (40.5%)			
Q066. Sexual Assault - To what extent do you agree with the following statements? I know how to direct a student or colleague to appropriate resources in the event of a sexual assault.				
				
<div><div></div> % Responding 1 or 2</div> <div><div></div> % Responding 3, 4 or 5</div> <div><div></div> % Responding 6 or 7</div>				
Key Text	N (%N)			% Resp = 98.7%
(1) Strongly disagree	3 (2%)			N = 151
(2)	3 (2%)			Mean = 5.89
(3)	4 (2.6%)			Std Dev = 1.35
(4) Neutral	7 (4.6%)			
(5)	26 (17.2%)			
(6)	45 (29.8%)			
(7) Strongly agree	63 (41.7%)			
Q067. Sexual Assault - To what extent do you agree with the following statements? I understand my role in reporting sexual assault.				
				
<div><div></div> % Responding 1 or 2</div> <div><div></div> % Responding 3, 4 or 5</div> <div><div></div> % Responding 6 or 7</div>				
Key Text	N (%N)			% Resp = 99.4%
(1) Strongly disagree	0 (0%)			N = 152
(2)	2 (1.3%)			Mean = 6.30
(3)	2 (1.3%)			Std Dev = 0.99
(4) Neutral	4 (2.6%)			
(5)	14 (9.2%)			
(6)	48 (31.6%)			
(7) Strongly agree	82 (53.9%)			

### Factor 13 . Institutional Response to Sexual Assault

Mean	Std Dev	N	% Responding
5.82	1.18	149	97.4 %

Key Text	N (%N)	% Resp = 94.1%
(1) Strongly disagree	1 (0.7%)	N = 144
(2)	1 (0.7%)	Mean = 5.81
(3)	6 (4.2%)	Std Dev = 1.31
(4) Neutral	19 (13.2%)	
(5)	21 (14.6%)	
(6)	37 (25.7%)	
(7) Strongly agree	59 (41%)	

Key Text	N (%N)	% Resp = 94.8%
(1) Strongly disagree	2 (1.4%)	N = 145
(2)	1 (0.7%)	Mean = 6.10
(3)	2 (1.4%)	Std Dev = 1.20
(4) Neutral	10 (6.9%)	
(5)	16 (11%)	
(6)	44 (30.3%)	
(7) Strongly agree	70 (48.3%)	

Key Text	N (%N)	% Resp = 93.5%
(1) Strongly disagree	2 (1.4%)	N = 143
(2)	2 (1.4%)	Mean = 5.90
(3)	2 (1.4%)	Std Dev = 1.29
(4) Neutral	14 (9.8%)	
(5)	22 (15.4%)	
(6)	41 (28.7%)	
(7) Strongly agree	60 (42%)	

Key Text	N (%N)	% Resp = 94.1%
(1) Strongly disagree	2 (1.4%)	N = 144
(2)	2 (1.4%)	Mean = 5.67
(3)	4 (2.8%)	Std Dev = 1.37
(4) Neutral	23 (16%)	
(5)	24 (16.7%)	
(6)	36 (25%)	
(7) Strongly agree	53 (36.8%)	

Key Text	N (%N)	% Resp = 92.2%
(1) Strongly disagree	3 (2.1%)	N = 141
(2)	4 (2.8%)	Mean = 5.62
(3)	3 (2.1%)	Std Dev = 1.45
(4) Neutral	20 (14.2%)	
(5)	22 (15.6%)	
(6)	40 (28.4%)	
(7) Strongly agree	49 (34.8%)	

Key Text	N (%N)	% Resp = 90.2%
(1) Strongly disagree	5 (3.6%)	N = 138
(2)	1 (0.7%)	Mean = 5.67
(3)	2 (1.4%)	Std Dev = 1.53
(4) Neutral	26 (18.8%)	
(5)	16 (11.6%)	
(6)	30 (21.7%)	
(7) Strongly agree	58 (42%)	



# Future Meetings

# Adjournment