



OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

March 16, 2026

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

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

At the meeting, the University President will provide opening remarks to review updates since the Board of Trustees' special meeting on February 2. This will also include an update on enrollment initiatives. Other items on the agenda will include a general discussion of the university's current financial sustainability project.

The board is also expected to discuss and act on a draft of the Fiscal Year 2025 external audit of the financial statements and the federal single audit. Pursuant to ORS 192.660 (2)(f) and ORS 192.345 (37), the board may hold an executive session to discuss this item. If so, no action will be taken in an executive session.

The meeting will occur as follows:

Thursday, March 19, 2026

5:15 p.m. to 7:30 p.m. (or until business concludes)

Meese Room, 3rd Floor, Hannon Library

Members of the public may view the proceedings at <https://sou.zoom.us/j/83705592223> at the time of the meeting.

Materials for the meeting are available at governance.sou.edu.

The Hannon Library is located at 1290 Ashland Street, on the Ashland campus of Southern Oregon University.

If accommodations for persons with disabilities are required, please contact Holly Frazier at (541) 552-8055 or email trustees@sou.edu. Accommodation requests should be made 48 hours in advance.



**Special Meeting of
the Board of Trustees
March 19, 2026**

Call to Order / Roll / Declaration of a Quorum



Special Meeting of the Board of Trustees

Thursday, March 19, 2026

5:15 – 7:30 PM (or until business concludes)

Meese Room, Hannon Library

Zoom: <https://sou.zoom.us/j/83705592223>

AGENDA

- | | | | |
|-----------|----------|---|--|
| 5:15 p.m. | 1 | Call to Order/Roll/Declaration of a Quorum | Chair Sheila Clough |
| | 1.1 | Welcome and Opening Remarks | |
| | 1.2 | Roll Call and Declaration of a Quorum | Sabrina Prud'homme, SOU,
Board Secretary |
| | 1.3 | Agenda Review | Chair Sheila Clough |
| | 2 | Action, Information, and Discussion Items | |
| 5:20 | 2.1 | President's Opening Remarks: Updates Since February 2, 2026, Special Meeting of the Board of Trustees | President Rick Bailey |
| 5:30 | 2.1.1 | Update on Enrollment Initiatives | President Rick Bailey; Dr. Casey Shillam, SOU, Provost and Executive Vice President. |
| 5:40 | 2.2 | General Discussion of Financial Sustainability Project | President Rick Bailey, Rob Patridge, SOU, General Counsel; Megan Cluver, Deloitte Consulting, Principal; Colin McWilliams, Deloitte Consulting, Senior Manager |
| 6:30 | 2.3 | Fiscal Year 2025 External Audits: Draft Financial Statements and Draft Federal Single Audit (Action) [Executive Session Pursuant to ORS 192.660 (2)(f) and 192.345 (37)]
<i>Note: No action will be taken in any executive session</i> | Dr. Carson Howell, SOU, Vice President for Finance and Administration; Bryan Simkanich, CLA, Signing Director |
| 7:30 p.m. | 3 | Adjournment | Chair Sheila Clough |

President's Opening Remarks:

**Updates Since February 2, 2026,
Special Meeting of the Board of Trustees**

Update on Enrollment Initiatives



Enrollment Marketing Analysis

Assessment of EAB impact on “top of funnel”

Impact on recruitment

Impact on yield

Decision to pursue EAB contract and hire new coordinator position



Importance of Yield

School	Yield Rate (Admit to Enroll)
Southern Oregon University	29%
Eastern Oregon University	20%
Oregon State University	20%
Western Oregon University	19%
Portland State University	18%
OSU-Cascades	14%
University of Oregon	14%
Oregon Tech	11%



Importance of Yield

Fall 2025 Yield overall was 34.7% (Admit to enroll)

First Year

Attended Campus Event: 459 Admits, 217 Enrolled (47% Yield)

Did Not Attend Event: 1357 Admits, 300 Enrolled (22% Yield)

Transfer

Attended Events: 91 Admits, 64 Enrolled (70% yield)

Did Not Attend: 380 Admits, 228 Enrolled (60% yield)



Visitor Experience & Enrollment Partnerships Coordinator

to Increase:

annual campus visitors

campus visit opportunities

yield rate of campus visitors

role of faculty in recruitment efforts

role of SOU students in recruitment efforts

Enrollment Marketing Analysis

Best Practice	Description	SOU's Grade	Would Consultant Help?	Notes
Data-Driven Enrollment Strategy	Data-informed at every level of the funnel; Predictive modeling, analyze historical enrollment patterns, ongoing analysis	B	YES	Consultant will have their own predictive modeling; impact depends how much it differs from RNL. Internally, we have good real-time funnel analysis and historical context. Consultants can always help in this area.
Personalized Communications	Segment comms by interest, geography, academic interest, behavior; personalized web experiences;	C+	YES	74% of students demand personalized communication; institutions using AI for 1:1 engagement report up to 48% positive impact on the funnel (UPCEA, 2025). Students respond significantly faster to SMS than email for deadlines; it is cited as a top 3 most effective recruitment tool (Mongoose/ERIC, 2025).
Multi-Channel Marketing	Combining and aligning consistent messaging across digital marketing, social media, email, print, phone, text, paid media, etc.	B	YES	Our admissions team consults with Institutional Marketing and aligns messaging consistently through multiple channels. Limitations in budget provide a challenge.
Modern Marketing	Multi-dimensional, responsive to each student's actions; rapid, hyper-personalized, mobile first.	D	YES	Rapid, responsive to actions, and hyper-personalized is what we are missing. This is the biggest area of impact a vendor would contribute.
Family and Influencer Engagement	Providing dedicated communication for parents to track; create events and webinars; sharing info, etc..	B	TBD	We already do a pretty good job of this by leveraging our Parent Portal for incoming and current students, as well as parent comms from our CRM.
Funnel Fluidity	Consistent and fluent engagement, seamless and streamlined processes: inquiry through enroll;	B	NO	Consultant would only affect increased inquiry and apps (top of funnel), no direct impact on yield.
High-Impact	Invest in campus visits and	B-	NO	Our campus visit experiences are very good, and arguably the most

Campus Experience	virtual experiences; personalize visit days by academic interest; provide faculty and student interactions.			impactful thing we do. Received a B- grade only because we need to do MORE. Over 50% of high-school seniors who attend our Preview Day end up matriculating to SOU.
Align Financial Aid and Enrollment Strategy	Use strategic and statistical FA awarding; communicate ROI; model aid scenarios to maximize yield.	C	NO	Currently adjusting remissions model following separation from RNL. Need to continue to evaluate. Using AI to allocate scholarships based on enrollment probability has shown yield rates as high as 90% for awarded students (Liaison, 2025).
Student-Centric Messaging, Speed of Response, and Value Proposition	Clear answers to career outcomes, ROI and affordability; academic flexibility; student support.	C+	YES	Certainly, a need to refine and communicate our value proposition. Responding within 48 hours is critical; delays beyond this window decrease enrollment likelihood by 30% (NACAC/DegreeSight, 2025).
Target Niche Audiences and Program markets	Recruiting micro populations; major specific campaigns, interest-based events; geographic targeting	C	YES	Institutions emphasizing "Career-Aligned" programs and micro-credentials see higher engagement from ROI-conscious Gen Z and adult learners (Hanover Research, 2025).
Direct Admissions	Partnering with local schools to guarantee admissions for all students above a certain GPA	B	NO	Our K-12 Partnerships provide opportunity for direct admissions initiatives. We are ahead of the curve on K-12 partnerships, but need to continue to cultivate and nurture new and existing relationships.
Strategic Partnerships	Partnerships with K-12, CC, and Employers, etc. to build top of funnel awareness	B+	NO	Transfer students are the highest-yield segment. Transparent, instant credit evaluations can generate 30+ leads per week (DegreeSight, 2025).

Partnering with a consultant would...

- Grow the top of funnel (Inquiry and applications)
- Provide improved program-specific marketing via email and digital
- Be helpful in a resource scarce environment
- Improve the personalization of marketing materials

Partnering with a consultant would NOT:

- Guarantee increased enrollment as it is not focused on yield
- Expand reach into new markets

Decision:

The partnership with EAB for Enrollment Marketing would benefit SOU from a top-of-funnel aspect. The impact on yield is also a strength of SOU when prospective students visit campus. The decision is to pursue the EAB contract, and simultaneously implement a strategy to improve and expand the campus visit experience.

Creating the position of “Visitor Experience & Enrollment Partnerships Coordinator” would focus on the following objectives:

- Increase annual campus visitors
- Increase campus visit opportunities
- Increase yield rate of campus visitors
- Increase role of faculty in recruitment efforts
- Increase role of SOU students in recruitment efforts

References:

UPCEA & EducationDynamics (2025): *Marketing and Enrollment Management AI Readiness Report.*

College Board (2025): *New Evidence on the Effect of Changes in College Admissions Policies.*

Hanover Research (2025): *Trends in Higher Education: Building Stability.*

Liaison International (2026): *Data-Driven Enrollment Management Strategies for 2025 and Beyond.*

NACAC (2025): *State of College Admissions Report.*

General Discussion of Financial Sustainability Project

Financial and Strategic Assessment

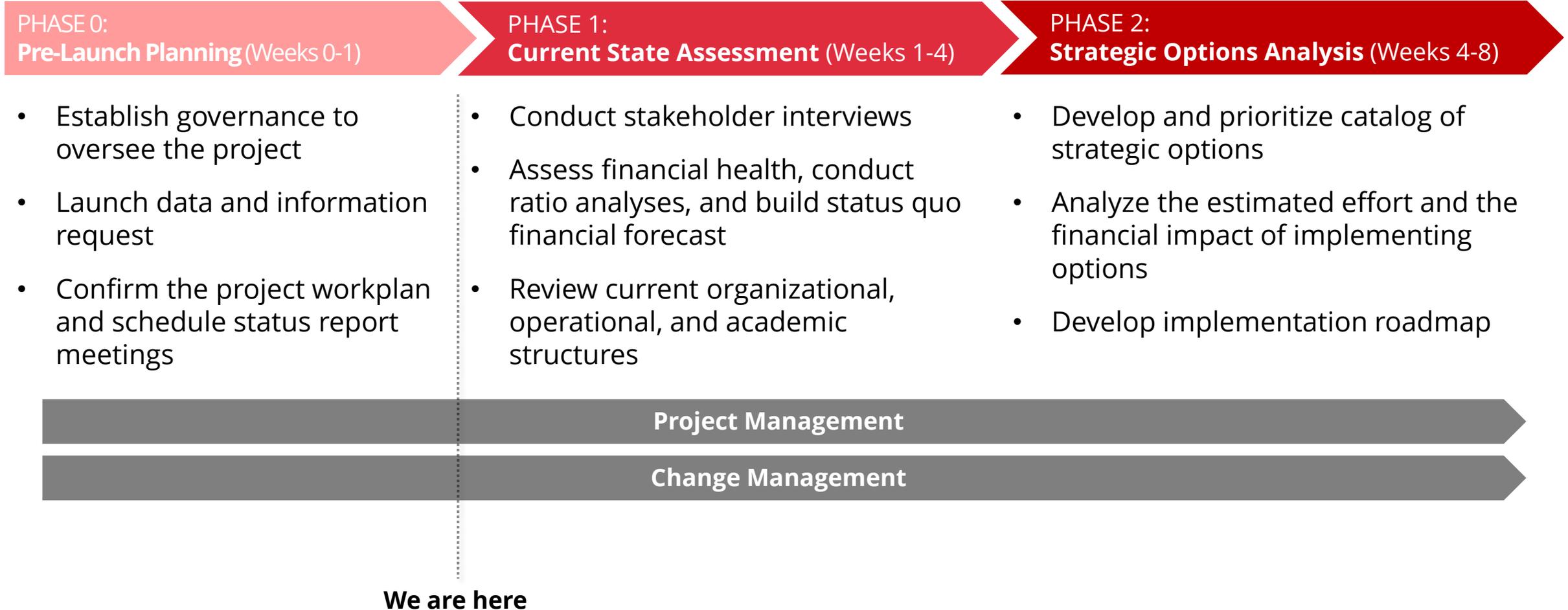
Project Updates

March 19, 2026



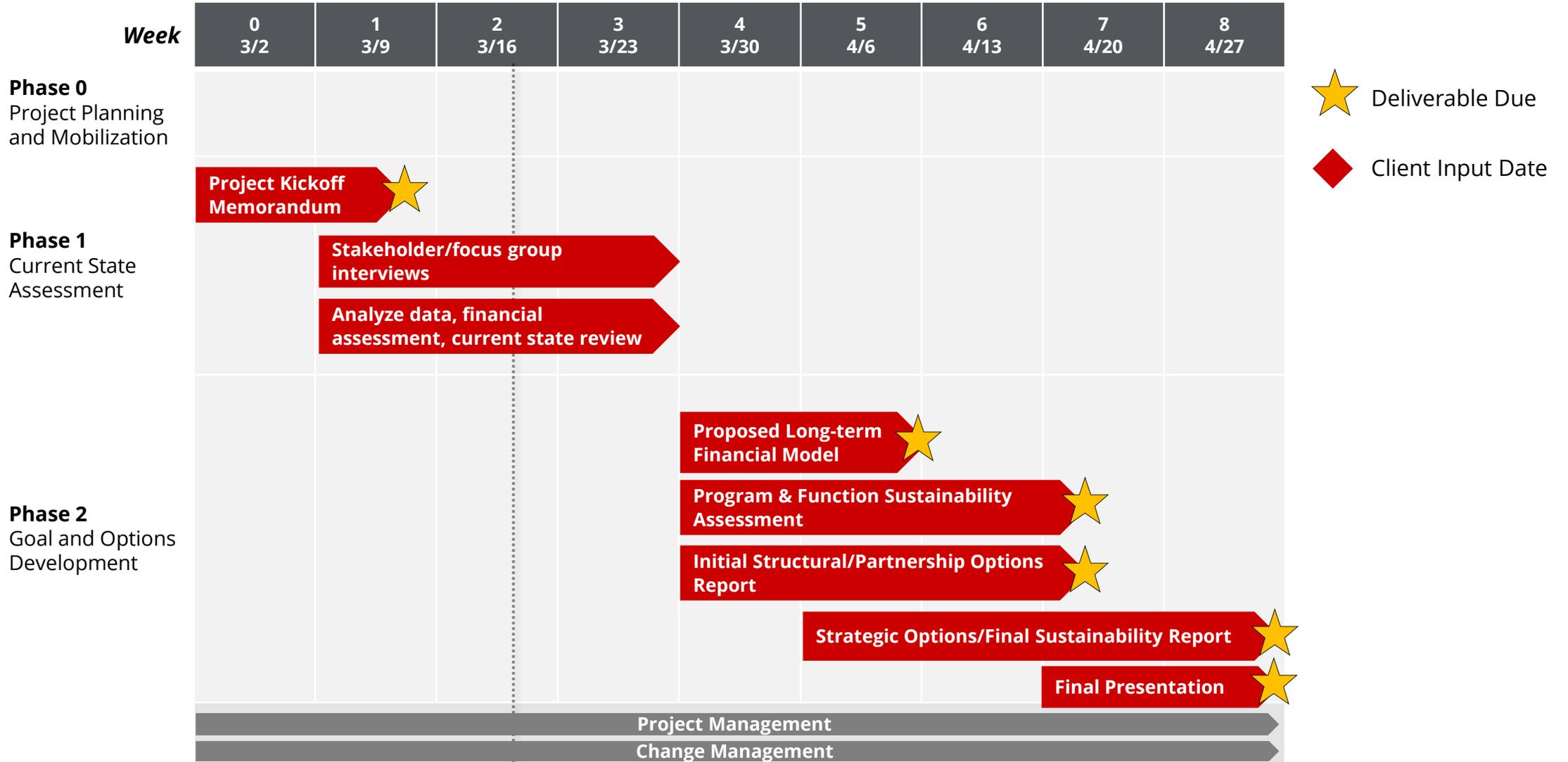
Deloitte's Approach

The project will use a phased approach that will build an understanding of the current state before defining future state strategic options to support Southern Oregon University.



Project Timeline

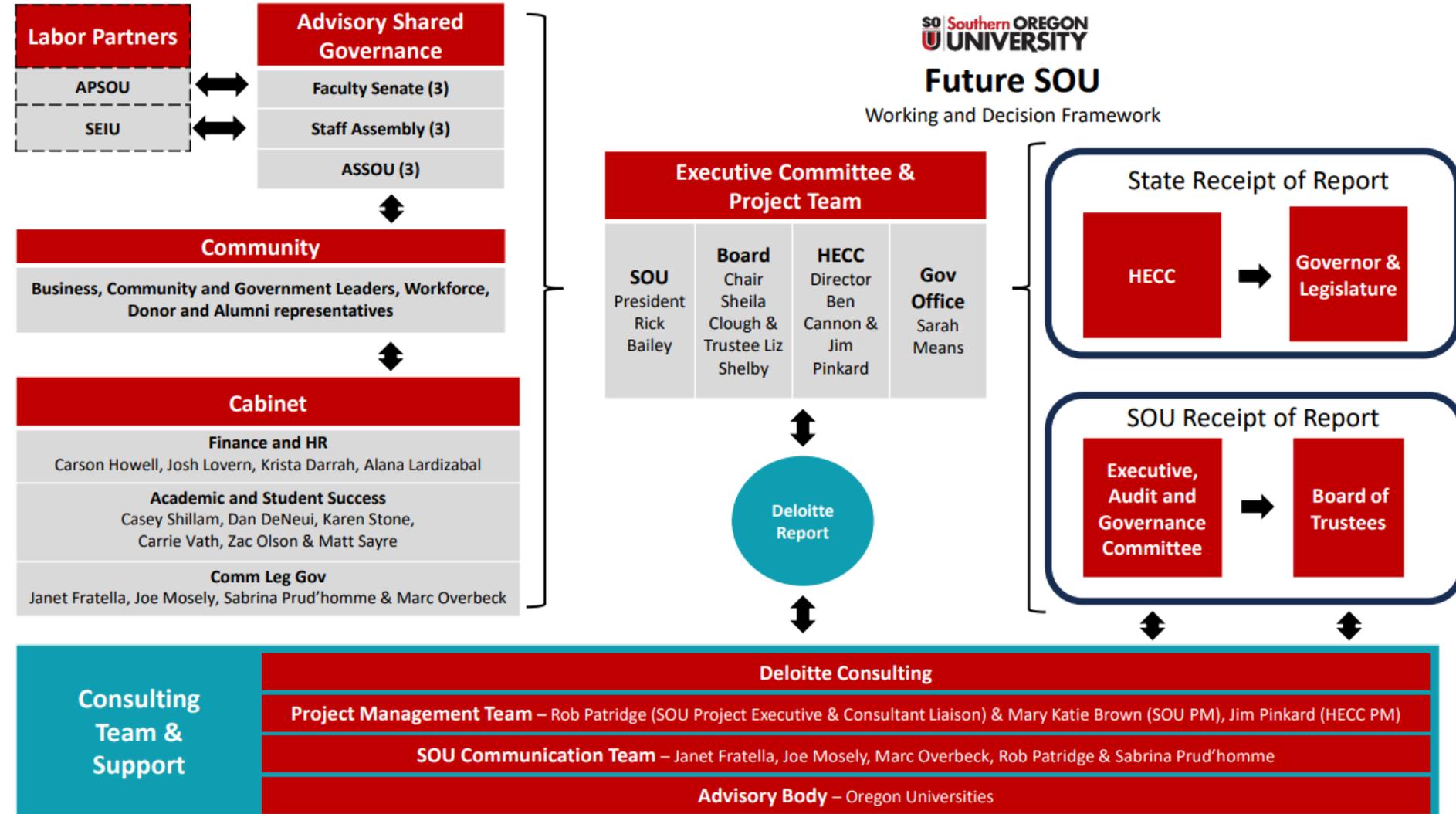
Deloitte will provide its final presentation by April 30, 2026.



★ Deliverable Due
◆ Client Input Date

Governance Structure

SOU will engage with Deloitte and its partners throughout this work.



Communications and Feedback

Deloitte will continue to solicit feedback from campus and partners throughout this project. SOU plans to provide weekly updates to the community.

Campus Communications

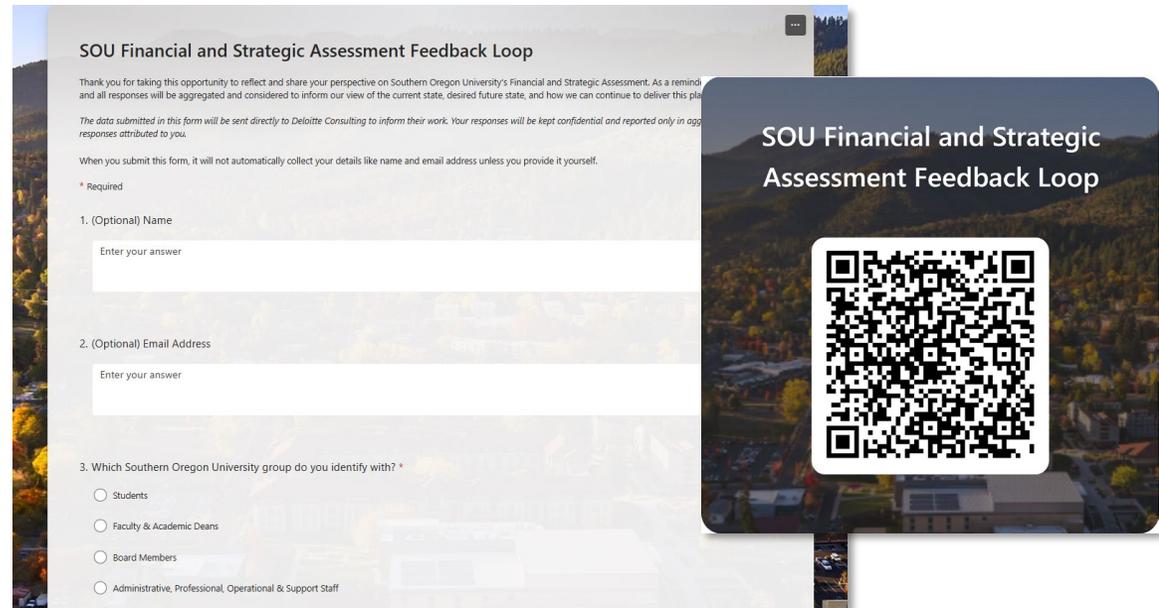
- SOU is providing weekly updates on project status and updates through email and its [website](#).
- Deloitte is on campus this week to host focus groups and will continue to solicit feedback throughout this project.

Engage with Deloitte Consulting

Deloitte is planning to host six facilitated focus groups of about 10 to 12 individuals per group that include: 1) Students; 2) Faculty; 3) Staff; 4) Directors and Chairs; 5) Cabinet+ and Deans; and 6) Community. These groups will serve as conduits for your thoughts and ideas as we all help to identify future programs and services that are regionally responsive and financially sustainable. Interviews with key stakeholders and focus groups will be held the weeks of March 16 and 23, both virtually and in-person.

Always On Feedback Loop

- SOU launched an “[always on feedback loop](#)” to campus on 3/13.
- This feedback will assist Deloitte in putting together its final plan.



Fiscal Year 2025 External Audits: Financial Statements and Federal Single Audit (Action)

Possible
Executive Session Pursuant to
ORS 192.660 (2)(f) and ORS 192.345 (37)

Materials for this section forthcoming

Adjournment