



OFFICE OF THE BOARD OF TRUSTEES

**Public Meeting Notice**

April 9, 2026

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

**FROM:** Sabrina Prud'homme, University Board Secretary

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

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

There are no action items on the agenda for this meeting.

Topics on the agenda include a Provost's report consisting of an update on the SOU Resiliency Plan including teach-out plans and related communications, and a program reinstatement; a Statewide Provost's Council update; and the process for faculty engagement and communication for SOU's financial sustainability project. A Student Affairs report will contain highlights of this departmental unit; the results of the Student Satisfaction Inventory; and the process for student engagement and communication for SOU's financial sustainability project. There will be an Admissions & Financial Aid report including a review of the Fall 2026 admissions funnel; the administration of financial aid programs and the Free Application for Federal Student Aid; as well as recruitment initiative highlights, including transfer relationships. An Enrollment Management report will provide a review of student demographic data and retention success strategies including information on a statewide re-enrollment initiative.

Trustees will review the proposed tuition and the single fee rates for Academic Year 2026-2027; an updates on accreditation; and a report on the Student Core Information System Replacement (CISR) project. Other topics on the agenda include the University Coaching and Mentoring (UCAM) Program and student highlight.

The meeting will occur as follows:

Thursday, April 16, 2026

1:00 p.m. to 4:00 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/89682474011> 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.



**Academic and Student Affairs  
Committee Meeting  
April 16, 2026**

# **Call to Order / Roll / Declaration of a Quorum**



Board of Trustees

## Academic and Student Affairs Committee Meeting

Thursday, April 16, 2026

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

Meese Room, Hannon Library, SOU Campus

Zoom: <https://sou.zoom.us/j/89682474011>

### AGENDA

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

- |           |          |   |  |
|-----------|----------|---|--|
| 1:00 p.m. | <b>1</b> | <b>Call to Order/Roll/Declaration of a Quorum</b>   |  |
|           | 1.1      | Welcome and Opening Remarks   | Chair Daniel P. Santos   |
|           | 1.2      | Roll and Declaration of a Quorum  | Sabrina Prud'homme,<br>SOU, Board Secretary  |
|           | 1.3      | Agenda Review   | Chair Daniel P. Santos   |
| 1:05      | 1.4      | University Coaching and Academic Mentoring (UCAM) and Student Spotlight                   | Jade Severson, SOU,<br>Lead Academic Coach<br>Mentor (UCAM); Faith<br>Nguyen, SOU, Student   |
| 1:15      | <b>2</b> | <b>Public Comment</b>   |  |
|           | <b>3</b> | <b>Provost's Report</b>   | Dr. Casey Shillam, SOU,<br>Executive Vice President  |
| 1:30      | 3.1      | Resiliency Plan Update  |  |
|           | 3.1.1    | Update on Teach-Out Plans and Related Communications                                      |  |
|           | 3.1.2    | Program Reinstatement   |  |
|           | 3.2      | Statewide Provost's Council Update  |  |
|           | 3.3      | Process for Faculty Engagement and Communication for SOU Financial Sustainability Project | Dr. Casey Shillam;<br>President Rick Bailey  |
| 1:55      | <b>4</b> | <b>Student Affairs Report</b>   | Dr. Carrie Vath, SOU,<br>Assistant Vice President<br>of Student Life and Dean<br>of Students |

**Board of Trustees**  
**Academic and Student Affairs Committee Meeting**  
**Thursday, April 16, 2026**  
**1:00 p.m. – 4:00 p.m. (or until business concludes)**

**AGENDA (Continued)**

- 4.1 Student Affairs Highlights
- 4.2 Student Satisfaction Inventory Results
- 4.3 Process for Student Engagement and Communication for SOU Financial Sustainability Project

2:20

**BREAK**

2:30

**5 Admissions and Financial Aid Report**

Zac Olson, SOU,  
Assistant Vice President  
of Enrollment Services

- 5.1 Review of Fall 2026 Admissions Funnel
- 5.2 Administration of Financial Aid Programs and the Free Application for Federal Student Aid
- 5.3 Recruitment Initiative Highlights

5.3.1 Transfer Relationships

President Rick Bailey;  
Zac Olson

2:50

**6 Enrollment Management Report**

6.1 Enrollment and Student Demographic Data

Dr. Carrie Vath; Zac  
Olson

6.2 Retention Success Strategies

Dr. Carrie Vath

6.2.1 Statewide Re-Enrollment Initiative

Zac Olson

**7 Information, Discussion, and Action Items**

3:05

7.1 Review of Tuition and the Single Fee Rates for Academic Year 2026-2027

Dr. Casey Shillam; Josh  
Lovern, SOU, Director of  
Budget and Planning

3:30

7.2 Accreditation Update

Dr. Dan DeNeui, SOU,  
Associate Provost

**Board of Trustees**  
**Academic and Student Affairs Committee Meeting**  
**Thursday, April 16, 2026**  
**1:00 p.m. – 4:00 p.m. (or until business concludes)**

**AGENDA (Continued)**

3:40	7.3 Student Core Information System Replacement Project (CISR) Report	Hart Wilson, SOU, CISR Project Manager; Dr. Carson Howell, SOU, Vice President for Finance and Administration
3:50	7.4 Future Meetings	Chair Daniel P. Santos
3:55 p.m.	<b>8 Adjournment</b>	Chair Daniel P. Santos

# University Coaching and Academic Mentoring (UCAM) Spotlight

# Program Spotlight: UCAM (University Coaching and Academic Mentoring)



## Mission

- Four staff provide holistic individualized coaching, executive function development, structured support, and community integration
- Cohesive, student-centered model with the flexibility and degree of personalization often only possible at smaller institutions
- Individualized supports + cohort grouping + community building = resilient and engaged students



## Impact

- UCAM is the only program of its kind west of the Mississippi
- SOU is consistently ranked among the top disability-friendly and ADHD-supportive institutions nationally
- 52% of UCAM students made Honor Roll in fall 2025
- AY 2024-25 UCAM persistence rate=87% (vs. 84% general UG population)
- Serve ~60 students; staff provide 765+ hours/term of direct student service
- 25% of all UCAM students participate on 80/90% program scholarship (funded by philanthropy)
- Financial viability: last two completed fiscal years have had ~\$40k surplus



## Students

- Spotlight: Faith Nguyen (BA in Psychology and Art, third-year UCAM student, and UCAM Student Mentor)
- Learn more about the students and families we serve at [ucam.sou.edu/stories](https://ucam.sou.edu/stories)
- Get involved by emailing [ucam@sou.edu](mailto:ucam@sou.edu)

# Public Comment

# Provost's Report

**Additional materials for this section forthcoming.**



# Academic and Student Affairs Committee

## Provost Report: April 16, 2026

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





# Resiliency Plan Changes

Financial Math

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Data Science

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Mathematics

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# Statewide Provost's Council

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Statewide Chief Academic Officer meeting

Continue building on our shared values and goals

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Next in-person meeting in May

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Transfer Council Efforts: shared Gen Ed model moving forward; in-person meeting in Eugene in May

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# Faculty Engagement

## Weekly DDC Meetings

- Collaboration
- Collecting stories
- Revising and honing academic vision

## Faculty Senate

- Weekly meetings with Advisory Council / Senators
- Deans joining Friday Cabinet+ meetings



# Tuition Advisory Council

## TAC Training Session

- Saturday, March 7, 2026
- Review of OARs
- Modeling scenarios

## TAC Recommendation

- Friday, March 20, 2026
- Zoom meeting
- Consensus on recommendation to President Bailey

## All-Campus Forum

- Wednesday, April 1, 2026
- Faculty, staff and students attended
- Robust discussion

## Enrollment Council

- Assessed Non-Resident, Graduate, and Differential Tuition
- Consensus on recommendation to President Bailey
- All tuition recommendations will be presented to the full Board April 17, 2026



# Tuition Advisory Council

Tuition Category	Current SCH Rate Per Term	Current Tuition per Academic Year	Proposed SCH Rate Per Term	Proposed Tuition per Academic Year (45 SCH)	Increase \$ per Credit	Increase \$ per Academic Year	Increased %
Resident Undergrad	\$238.19	\$10,718.55	\$250.98	\$11,294.10	\$12.79	\$575.55	5.37%

Mandatory Enrollment Fees	Current Fee Per SCH	Current Per AY (24 SCH Cap)	Proposed Fee Per SCH	Proposed Per AY (24 SCH Cap)	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Health Services Fee	\$23.38	\$561.00	\$23.38	\$561.00	\$0.00	\$0.00	0.00%
Building Debt-Service Fee	\$6.50	\$156.00	\$6.50	\$156.00	\$0.00	\$0.00	0.00%
Technology Services Fee	\$4.09	\$98.25	\$4.09	\$98.25	\$0.00	\$0.00	0.00%
HECC - Composite Tuition & Mandatory Enrollment Fees	\$272.16	\$11,533.80	\$284.95	\$12,109.35	\$12.79	\$575.55	4.99%

# Student Affairs Report

# Student Affairs Program Highlights

## **Cause Awareness: April**

Sexual Assault Awareness & Prevention

Stress Awareness

Autism Acceptance

National Minority Health



## **Cause Awareness:**

Trans Day of Visibility (3/31)

World Autism Awareness Day 4/2

World Health Day (4/7)

SAAM Day of Action(4/7)

Earth Day (4/22)

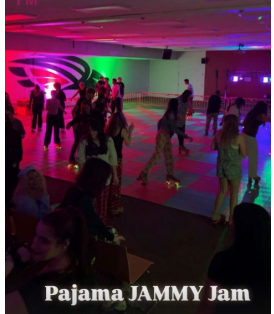
Denim Day (4/29)

Dr. Carrie Vath

April 16, 2026

## Belonging & Engagement

- CBA Club Involvement Fair + SU Open House Combined Event- Over 100 students participated
- Pajama Jammy Jam and Roller Rink Night- over 150 students attended. Planning to make this an annual tradition
- Clothing Swap- Partnership with Institute of Applied Sustainability- over 50 students attended a community-centered clothing exchange focused on sustainability and connection
- EPIC hosted 13 events during winter term with 718 attendees (Blind Date with a Book continues to be a tradition, n= 155, and Stuff-A-Plush had over 154 students engage)
- The Racial Justice Team, Black Student Union, Native American Student Union, Samoan Club members, SJEC community members, and SOU Raiders Football team members volunteered during the Martin Luther King, Jr. Day City of Ashland Celebration.



## Dean of Students Office

- Food Pantry: 1,202 visits by 315 unique students (39% visit increase from last winter), March food Drive raised over \$12,000 (more than \$6K than last year)
- Cares Support: 240 Care Cases for Winter 26 Term (564 for the full academic Year) serving 230 unique students.

## Career Connections

- 220 individual appointments to date (188 unique individuals)
- Over 500 students reached to date via classroom and club presentations (93% rated presentation as very satisfied or satisfied)
- First Destination Survey 2024-2025 Graduates
  - 52% response and knowledge rate (402 out of 760 graduates)
    - 70% employed; 14% continuing education; 11% still seeking employment
    - Top 2 employers SOU and Asante (3% each)
    - Top Industry: Education & Teaching (17%); Program Coordinator (9%); Finance & Accounting (6%)

## Campus Recreation

- Averaged 1,663 visits per week during winter term
- “Love at First Rec” event had 93 students attend
- Partnered with Faculty to offer Staff/Faculty 2 mindfulness sessions (34 people attended)
- Rec Sports offered an intramural basketball tournament (n=36), Drop-in Dodgeball (n= 23), and Trivia night (n= 27)



## Disability Resources/UCAM

- 509 students registered in DR; 54 students in UCAM
- Proctored 95 exams during finals week
- 627 appointments in UCAM

## Stevenson Union

- Fall & Winter term: 1,669 bookings, up from the previous year of 1,157 events booked. (+512 events)
- 94,337 people entered the building, down from 96,076. (-1,739 fewer)
- Resources set up by the crew (furniture, AV equipment, etc.) increased from 15,257 to 18,007. (+2,750 resources used)
- “Permageddon”, a new conference in the area. ~400 participants for their inaugural conference and requested space for 2026.
- Tabled in Winter term for student feedback on “SOU Underground” (first floor space), resulting in moving “games” to first floor and researching additional purchases.



## Trio-Success at Southern

- Submitted Annual Performance Report (APR) in February 2026 to the US Dept. of Education. Once again, they met all of the objectives.

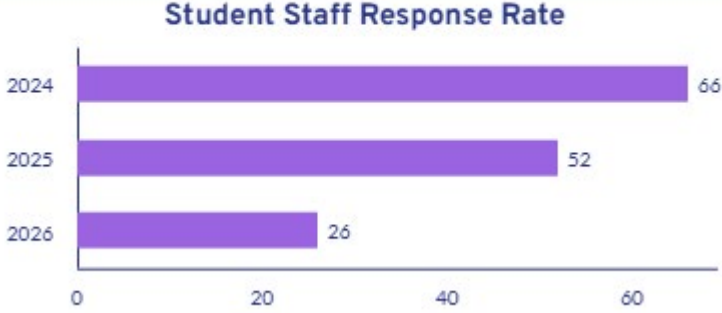
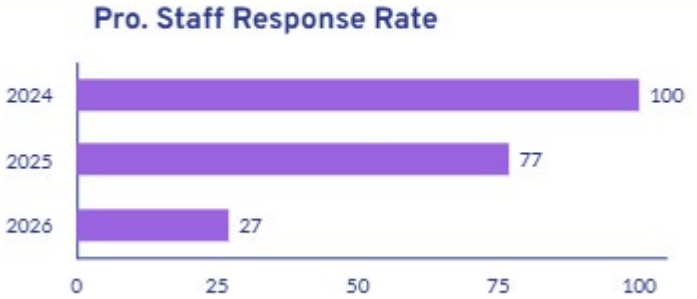
Program Year 2024 - 2025		Objective	Outcome
<b>SSS Objectives(Used to calculate Prior Experience Points)</b>			
<b>Funded Number Criteria</b>			
SSS participants that were served during the fiscal year.		190	104.21%
<b>Met Eligibility Criteria:</b>			
At least two-thirds of the participants served during the project should be low-income and first-generation, students with disabilities, or students with disabilities who are low-income.		66.67%	76.77%
<b>Disability Criteria:</b>			
If project served students with disabilities, at least one-third of those students are low-income.		33.33%	64.81%
<b>Persistence Rate (4 year college): #34 = 1, or 5 / (# 22 = 1, 2, 8 or 9 OR #funded : greater of the two)</b>			
Objective: x% of all project participants served by the SSS Project will persist from one academic year to the beginning of the next academic year or graduate and/or transfer from a 2-year to a 4-year institution during the academic year.		77.00%	93.94%
<b>Good Academic Standing (GSA) Rate: #24 = 1 / (# 22 = 1, 2, or 8 OR #funded minus #22 =9 : greater of the two)</b>			
Objective: x% of all project participants served by the SSS Project will meet the performance level required to stay in good academic standing at the grantee institution.		89.00%	91.41%
<b>Bachelor's Degree Attainment Rate: (for 4-year institutions only) #31 = 4 or 6 / # 21 = 21</b>			
Objective: x% of new participants served each year will graduate within six (6) years.		45.00%	67.12%

## University Housing

- Conferencing Season has started- Housing is on track to reach \$1,000,000 in revenue (2024-2025 revenue was \$1,135,612) With the loss of Cascade and facilities issues in Greensprings 24.25 saw an estimated loss of ~\$200,000, which will continue to impact 25.26)
- Housing completed the student staff selection process. Over 100 applications for Resident Advisors, Conference Assistants, and Resident Manager Positions.

# Student Affairs Employee Satisfaction Survey

## Participation



We are seeing a steep decline in engagement among students and staff.

## Job Satisfaction



## What factors most strongly affect your satisfaction with work?

Top three themes:

1



**Morale**  
Team is feeling stressed and worried about institution stability

2

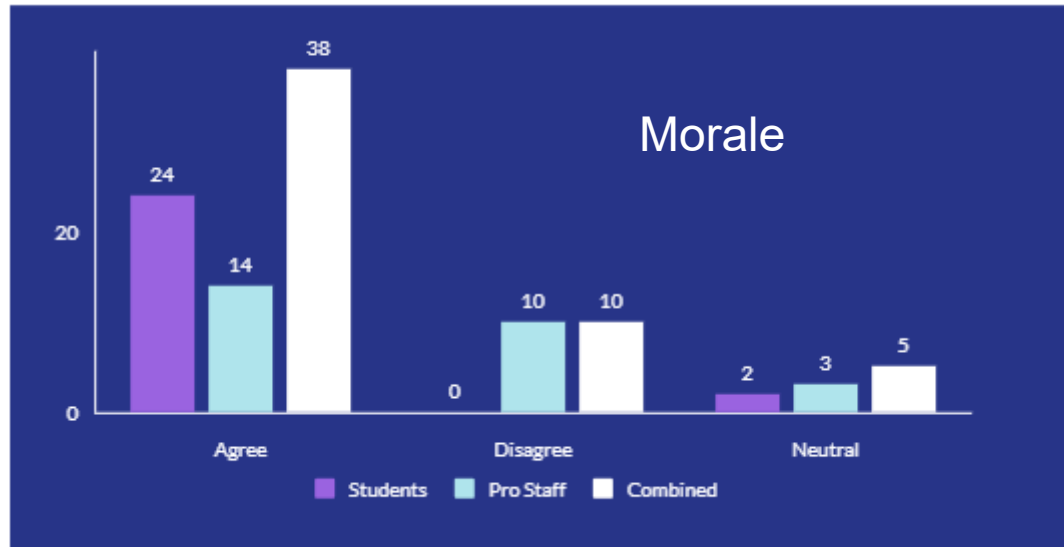


**Workload (driven by staffing gaps)**  
Vacant positions and being understaffed

3



**Communication & Team Functioning**  
Unclear expectations  
Missing Access to information



Staff report a highly positive team culture and strong sense of purpose in their work with students. However, institutional constraints—particularly funding, staffing, and capacity—combined with opportunities to strengthen communication, consistency, and work structures, are making the work increasingly difficult to sustain

The **best thing** about working in my department



People & Team Culture



Meaningful work & Student Impact



Flexibility, Autonomy & Trust



Supportive Supervision & Leadership

What could make it better?



Salaries/Wages



More Staff



Equity in work modality



Leadership, Accountability, & Communication

# Key Differences & Evolving Trends 2024-2026

Category	2024: Stability & Gratitude	2025: Growing Friction	2026: Crisis & Structural Change
<b>Top Positive</b>	Collaborative teams and "cool" supervisors.	Support from immediate peers despite rising workloads.	Resilience of frontline staff and meaningful student impact.
<b>Leadership</b>	Generally viewed as supportive and stable.	Initial calls for more "empathy" and a "collective mindset".	Sharp critique of "death by a thousand cuts" and a perceived lack of vision.
<b>Compensation</b>	Mentioned as a baseline need.	Growing frustration with stagnant wages amid rising costs.	Urgent demand for "sustainable living wages" and annual step increases for financial stability.
<b>Work Environment</b>	Appreciation for hybrid/flexible options.	Tension regarding "individualistic" vs. "collective" work styles.	Direct resentment toward inconsistent in-person staffing and "poor service" in specific department

# Sentiment Heatmap: 2025-2026 Trends

Focus Area	2024 Sentiment	2025 Sentiment	2026 Sentiment	Analysis of Trend
Student Impact	Very Positive	Very Positive	Positive	Consistent Core: The "sense of purpose" from 1:1 student work remains the primary driver of satisfaction.
Peer Collaboration	Very Positive	Positive	Mixed	Rising Tension: In 2024, teams were "cohesive" ; by 2026, there is resentment over "me/my mode" vs. "we/us mode".
Flexibility/Work-Life Balance	Positive	Mixed	Negative/Tense	The "Flexibility Gap": 2024 praised autonomy , but 2026 responses cite "demoralizing" imbalances where some staff work remotely while others are "taxed" with all in-person duties.
Leadership & Vision	Positive	Neutral	Negative	Erosion of Trust: Shift from "feeling supported and stable" to critiques of "death by a thousand cuts" and a lack of leadership humility.
Compensation & Sustainability	Neutral	Negative	Critical/Urgent	Financial Crisis: 2024 mentioned pay as a "complaint"; 2026 describes current wages as "unsustainable" and "not mathing" against the cost of living.

The Student Affairs team is facing a 'Resilience Deficit': as the gap between rising workloads and stagnant resources widens, the emotional and professional exhaustion of our staff has become the single greatest threat to our student success and retention goals.

# Student Satisfaction Inventory (SSI)

Definition of satisfaction:

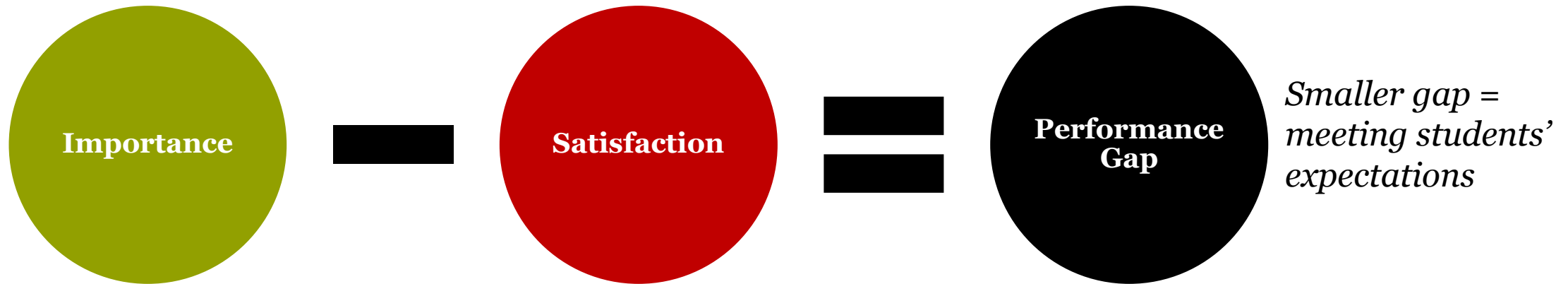
“When expectations are met or exceeded by the student’s perception of the campus reality.”

Schreiner, L., & Juillerat, S. (1994). Student satisfaction inventory: 4-year college and university version.  
Iowa City, IA: Encoura + RNL

**Dr. Carrie Vath**  
**April 16, 2026**

# What does the SSI Measure?

- Reasons for Enrollment
- Scales of Importance
- How students *Feel* about their *Experience*



# Context That Shaped Student Responses

## Institutional Environment During Survey Window

- The SOU Resiliency Plan (July–October) introduced program uncertainty for both incoming and continuing students
- The financial crisis announcement (January–present) coincided directly with the survey window (Jan 29 – Feb 13)
- These factors likely influenced student perceptions of stability, support, and communication

## Survey Representation & Respondent Profile

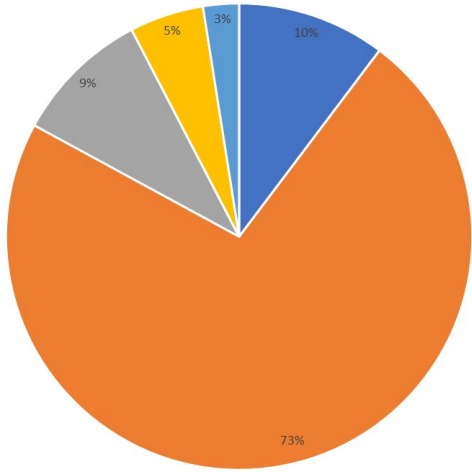
- Strong overall response rate: 27% (above typical ~20% benchmark)
- Some populations were overrepresented relative to campus demographics:
  - Student-athletes: 30% of respondents (vs. ~20% campus)
  - Students with disabilities: 29% (vs. ~12–14% estimated campus population)
- Overrepresentation also improved racial/ethnic representation, particularly among BIPOC students

# Who Are Our Students? (response rate = 27%, n=631)

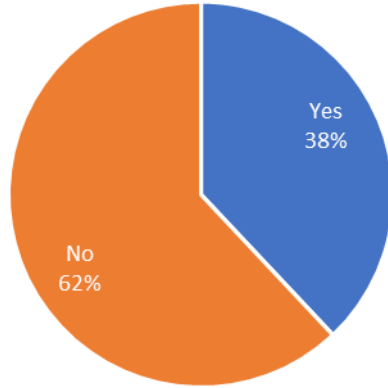
SSI administered Jan. 29-Feb. 13 2026

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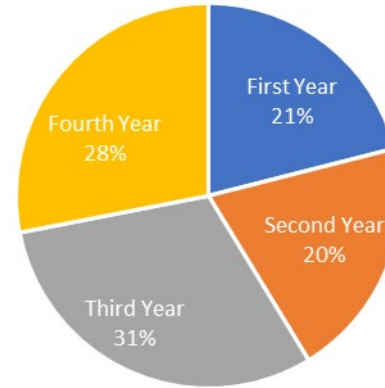
■ 18 and Under ■ 19-24 ■ 25-34 ■ 35-44 ■ 45 and over



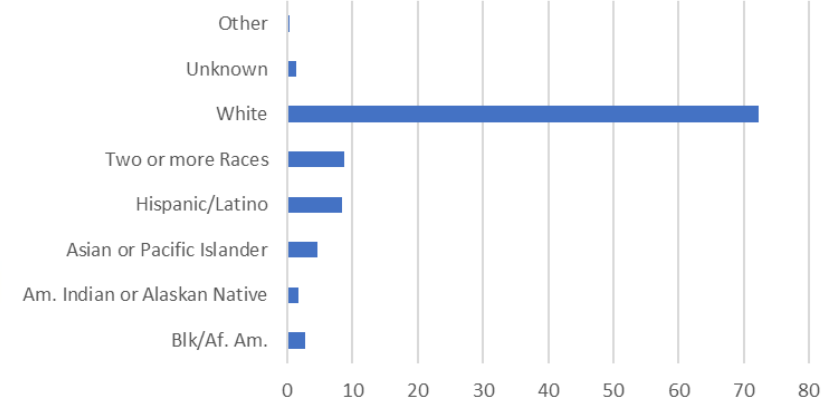
Identify as 1st Generation College Student



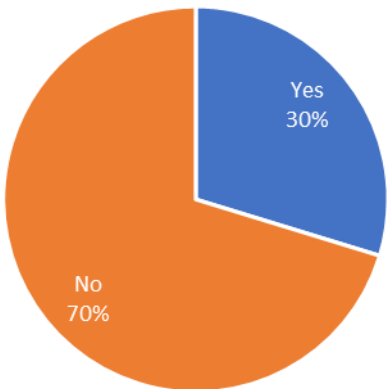
Class-level



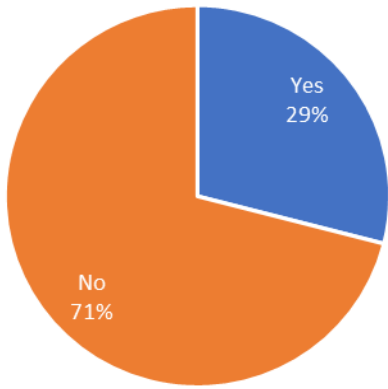
Ethnicity/Race



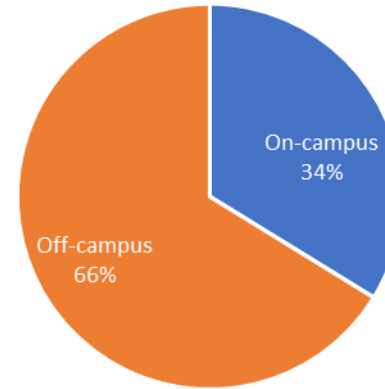
Student Athlete



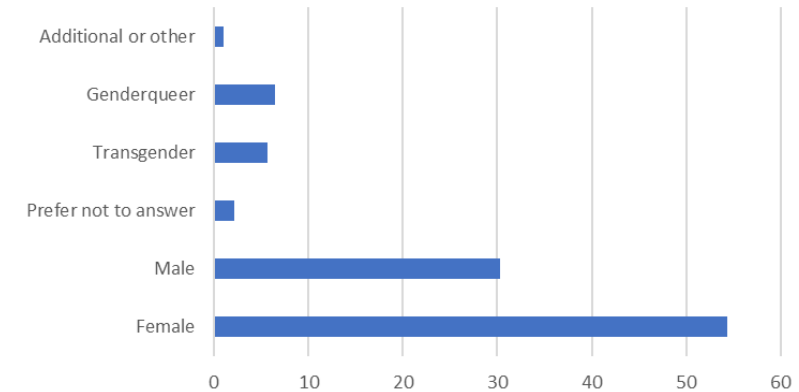
Identify with having a Disability



Current Residence



Gender



In-State 65.74%  
Out of State 33.13%  
International 1.14%

## Institutional Choice

Demographic Responses	N	%
1st choice	421	69.36%
2nd choice	136	22.41%
3rd choice or lower	50	8.24%
Total	607	100.00%
No Answer	24	

Students attending their first-choice institution are more likely to have higher satisfaction levels overall.

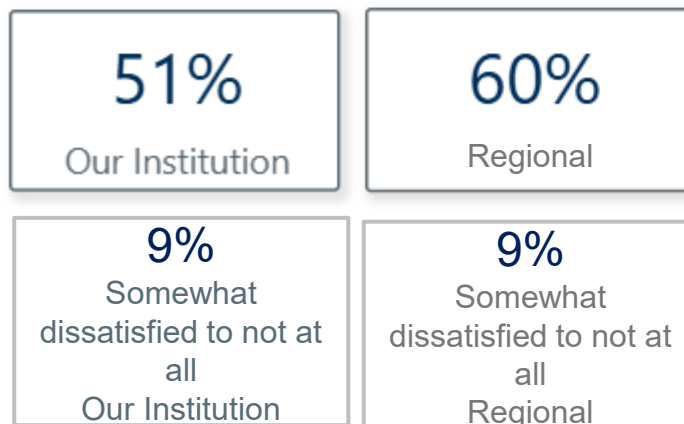
Class Standing	1 <sup>st</sup> Choice Institution	Overall Satisfaction	Re Enrollment
Freshman	65%	47%	61%
Sophomore	73%	55%	67%
Junior	74%	52%	59%
Seniors	65%	55%	64%

## Bottom Line Indicators

### Satisfied / Very Satisfied

How satisfied are our students compared with students nationally?

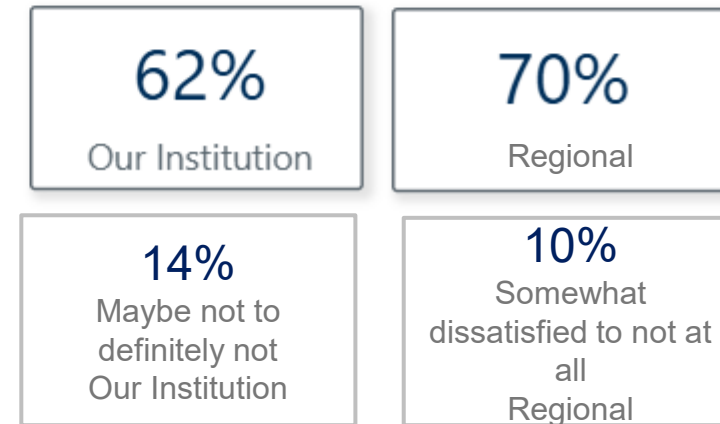
Percentages below indicate the students indicating Satisfied/Very Satisfied.



### Probably / Definitely Yes

How likely are our students to enroll again, if they had it to do over?

Percentages below indicate the students indicating Probably/Definitely yes.



# Why Do Our Students Enroll Here?

## Top 5 Factors to Enroll

Item	Importance %
Financial aid as factor in decision to enroll.	82%
Cost as factor in decision to enroll.	81%
Geographic setting as factor in decision to enroll.	64%
★ Academic reputation as factor in decision to enroll.	59%
Campus appearance as factor in decision to enroll.	52%
Personalized attention prior to enrollment as factor in decision to enroll.	52%

★ *Nationally: the importance of Ac. Reputation is 73%*

Major	Item
Art	#4 Size of institution
Biology	#3 Personalized attention prior to enrollment
Biomedical	#4 Opportunity to play sports as a factor in decision to enroll
Business	#1 Opportunity to play sports as a factor in decision to enroll
Communication	#3 Size of institution
CCJ	#1 Geographic setting
Digital Cinema	#3 Size of institution
HEX	#1 Opportunity to play sports as a factor in the decision to enroll
SOAN	#3 Size of institution

*No major differences were seen in any other programs that had a response rate above 20% (n=19)*



Demographic	Item
Student Athletes	#1 Opportunity to play sports as a factor in decision to enroll
African American	#1 Opportunity to play sports as a factor in decision to enroll
American Indian/Alaskan Native	#2 Personalized attention prior to enrollment
GenderQueer	#2 Personalized attention prior to enrollment

*No major differences seen in any other identities (students with disabilities, age, residency, 1<sup>st</sup> gen status, race/ethnicity, gender etc.)*

# What Areas Matter Most to Our Students?

1. Academic Advising
2. Instructional Effectiveness
3. Student Centeredness
4. Recruitment and Financial Aid
5. Safety and Security
6. Registration Effectiveness
7. Campus Climate
8. Campus Support Services
9. Concern for the Individual
10. Service Excellence
11. Campus Life

Demographic	What Matters
Student Athlete	#3= Campus Climate, Campus Support Services, Registration Effectiveness
Genderqueer	#1 Safety and Security
Transgender	#1 Recruitment & Financial Aid
Two or More Races	#3 Safety and Security, #4 Campus Support Services
American Indian/Alaskan Native	#1 Campus Climate
Asian/Pacific Islander	# 3 Campus Support Services
African American	#1 Recruitment & Financial Aid, #3 Campus Support Services
45 and over	#1 Campus Support Services

*No major differences seen in any other identities*

Biology, Business, Communication, CCJ, Digital Cinema, Media Innovation, and SOAN had Campus Support Services, Concern for Individual in their Top 4

*No major differences seen in any other majors*



# Where Do Our Students Think we are Doing Well?

## Strengths

	Item
★	The campus is safe and secure for all students.
★	Nearly all of the faculty are knowledgeable in their field.
★	My academic advisor is knowledgeable about requirements in my major.
★	The content of the courses within my major is valuable.
★	I am able to experience intellectual growth here.
★	My academic advisor is approachable.
★	Freedom of expression is protected on campus.
★	Males and females have equal opportunities to participate in intercollegiate athletics.
★	Students are made to feel welcome on this campus.
★	Faculty are usually available after class and during office hours.
★	Campus item: I feel welcome in service and business establishments (stores, restaurants, theaters, parks) in and around Ashland.
★	On the whole, the campus is well-maintained.
★	Library resources and services are adequate.

# Where Do Our Students Think we Could be Doing Even Better?

## Challenges

---

	Item
	Security staff respond quickly in emergencies.
	I am able to register for classes I need with few conflicts.
	Major requirements are clear and reasonable.
	It is an enjoyable experience to be a student on this campus.
	Computers and/or Wi-Fi are adequate and accessible.
	There is a good variety of courses provided on this campus.
	Adequate financial aid is available for most students.
	Living conditions in the residence halls are comfortable (adequate space, lighting, heat, air, etc.)
	Tuition paid is a worthwhile investment.
	Financial aid counselors are helpful.
	Financial aid awards are announced to students in time to be helpful in college planning.
	This institution shows concern for students as individuals.
	Faculty provide timely feedback about student progress in a course.
	Admissions staff are knowledgeable.
	Campus item: There is ample to time to study, relax, and engage in campus life outside of attending class and athletic commitments.

# Student Experience

Strengths

## What's Working Well

### Faculty Relationships

- Supportive, flexible, high-quality instruction

### Academic Experience

- Engaging classes, strong programs

### Community & Connection

- Small campus feel, meaningful relationships

## Where Students Struggle

### Advising & Registration

- Access issues, course availability barriers

### Administrative Communication

- Inconsistent info, "runaround" between offices

### Financial Transparency

- Confusing billing, unexpected costs

### Program Stability

- Concerns about cuts, uncertainty about future

### Student Life & Facilities

- Limited engagement, housing/dining frustrations

### Online & Access Gaps

- Limited options, uneven support

Friction Points

*Strong academic core + strained systems = student stress, delays, and attrition risk*

## Next Steps: Before end of Spring Term

- Working with Cabinet on Action Plan for goals for AY26-27
- Share with Faculty Senate, ASSOU (High Level)
- Share with Students (Student lens)
- Share with Student Affairs & Enrollment Services Team (Enrollment Management lens)
  - Include staff focus groups
- Share with Provost Leadership Council (Academic Lens Focus)
- Offer to do Departmental Presentations (program specific)
- All Campus Info-graphic
- CampusESP Family Portal Info-graphic

# PATH TO FISCAL SUSTAINABILITY

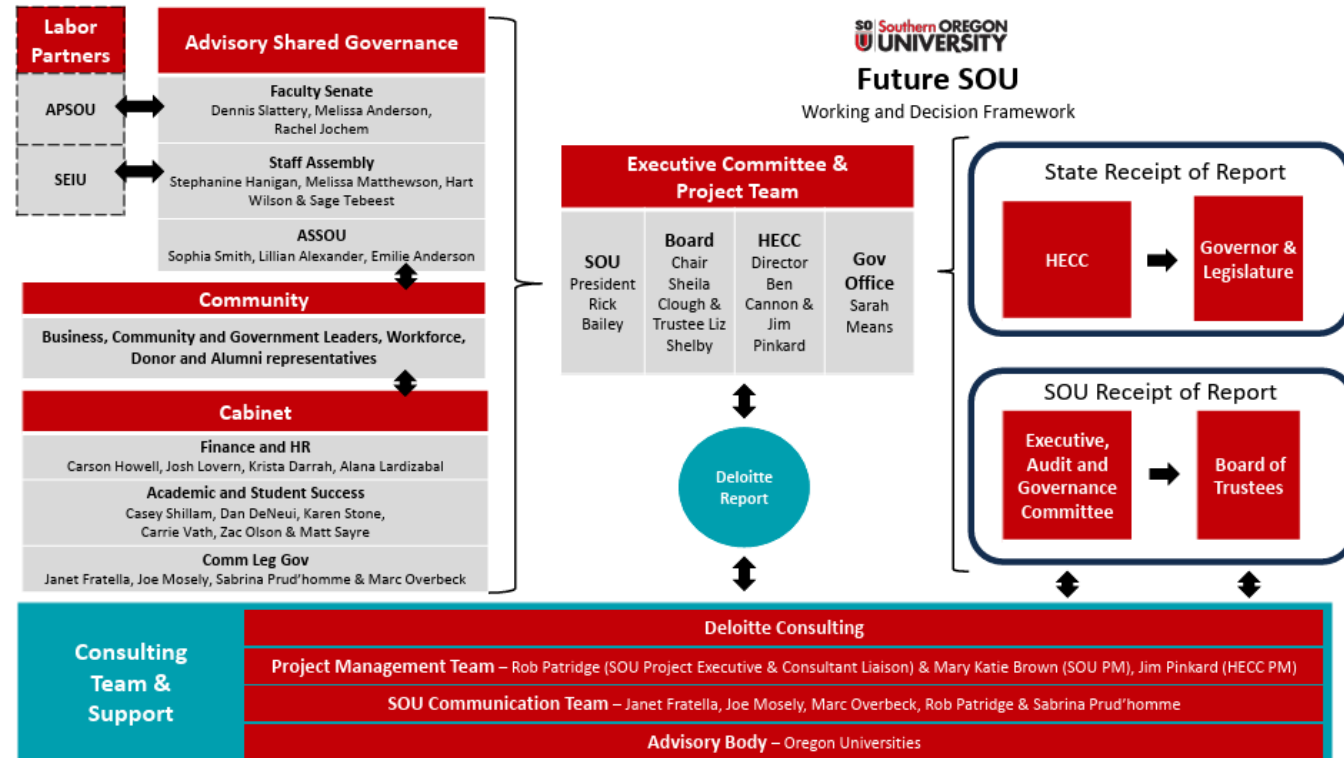
Collaborative process for SOU to sustain its presence and impact for students and the region



Dr. Carrie Vath  
April 16, 2026

# Student Engagement: Coordinated Communication

1. Student focus group: Students identified through ASSOU
2. Campus Communications: 10 communications from President Bailey (2/3-3/27)
3. Communication from ASSOU President: 3 communications (Town Hall summary and direct communication about Deloitte)
4. Deloitte Public Feedback Loop form (as of 3/27, students made up 7.9% of the comments)
5. Students can share their feedback directly with ASSOU via senators, senate meetings, or Executives
6. Shared Campus Communication with family and support network through CampusESP (2/13 email message, 59% open rate)
7. Social Media posts related to the situation and updates



# Admissions and Financial Aid Report

# April Updates

**Admissions, Financial Aid, Raider Student Services, Outreach & Engagement, International Programs**

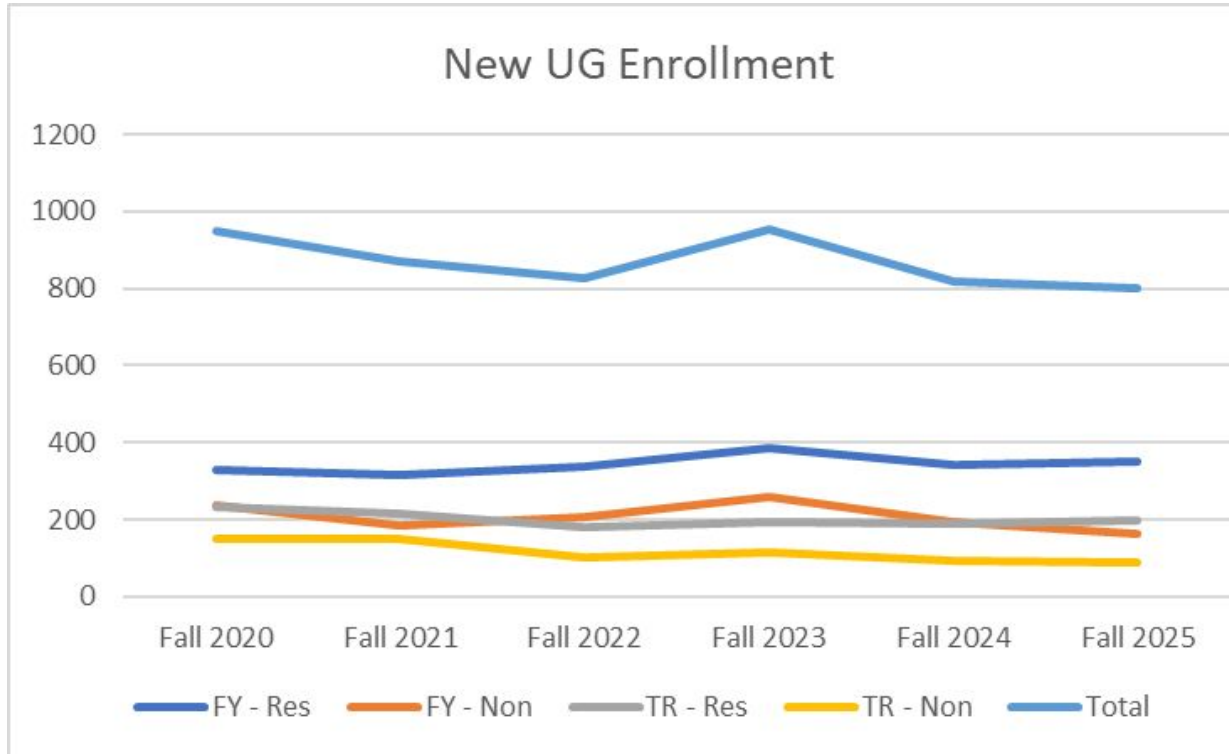


Zac Olson, Assistant Vice President of Enrollment Services

April 16, 2026

# Historical Trends

## New UG Enrollment



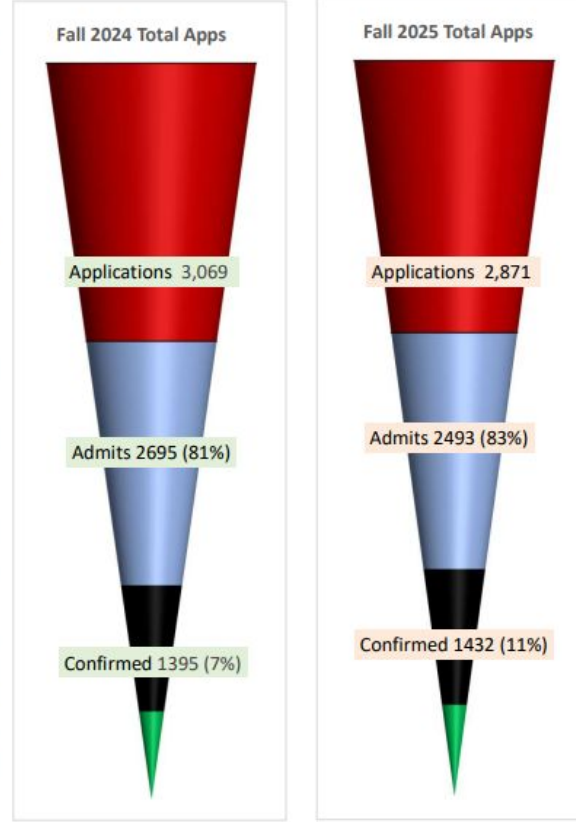
Funnel Report: New Applicant Headcount by Student Type  
Fall 2024 Week Ending 10/20/24 vs. Fall 2025 Week Ending 10/19/25  
4 Weeks After Start of Term

Applications				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	1,166	1,117	-49	-4.2%
Freshmen - Nonresident	1,033	849	-184	-17.8%
Transfer - Resident	305	329	24	7.9%
Transfer - Nonresident	211	231	20	9.5%
Postbacs/Grads	354	345	-9	-2.5%
<b>Total Apps</b>	<b>3,069</b>	<b>2,871</b>	<b>-198</b>	<b>-6.5%</b>

Admits				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	1,097	1,036	-61	-5.6%
Freshmen - Nonresident	934	768	-166	-17.8%
Transfer - Resident	259	291	32	12.4%
Transfer - Nonresident	172	169	-3	-1.7%
Postbacs/Grads	233	229	-4	-1.7%
<b>Total</b>	<b>2,695</b>	<b>2,493</b>	<b>-202</b>	<b>-7.5%</b>

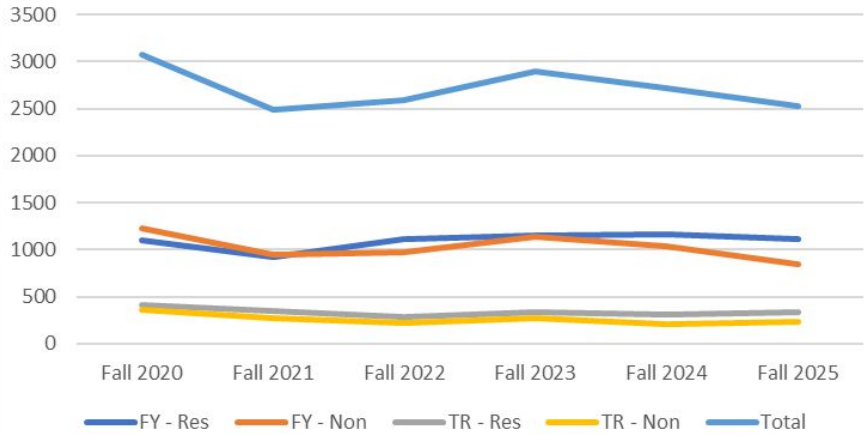
Confirmed				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	497	508	11	2.2%
Freshmen - Nonresident	293	309	16	5.5%
Transfer - Resident	243	249	6	2.5%
Transfer - Nonresident	129	137	8	6.2%
Postbacs/Grads	233	229	-4	-1.7%
<b>Total</b>	<b>1,395</b>	<b>1,432</b>	<b>37</b>	<b>2.7%</b>

Enrolled				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	340	349	9	2.6%
Freshmen - Nonresident	194	164	-30	-15.5%
Transfer - Resident	189	198	9	4.8%
Transfer - Nonresident	94	88	-6	-6.4%
Postbacs/Grads	157	165	8	5.1%
<b>Total</b>	<b>974</b>	<b>964</b>	<b>-10</b>	<b>-1.0%</b>

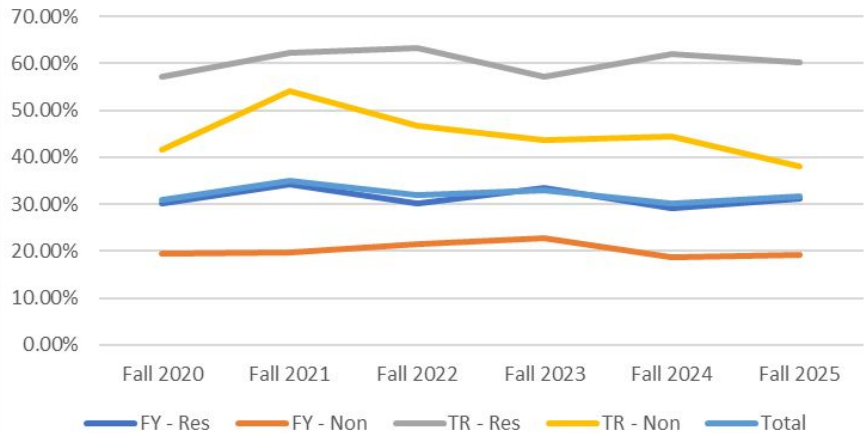


# Trends Con't

UG Applications



App to Enrolled Yield



Admit to Enrolled (4 weeks after start of term)

		Fall 2020	Fall 2021	Fall 2022	Fall 2023	Fall 2024	Fall 2025
FY - Resident	Admit	1003	878	1034	1058	1097	1036
	Enrolled	331	317	338	386	340	349
	Yield	33.00%	36.10%	32.69%	36.48%	30.99%	33.69%
FY - Nonresident	Admit	1090	868	884	1040	934	768
	Enrolled	239	187	208	259	194	164
	Yield	21.93%	21.54%	23.53%	24.90%	20.77%	21.35%
TR - Resident	Admit	354	320	268	291	259	291
	Enrolled	232	217	181	194	189	198
	Yield	65.54%	67.81%	67.54%	66.67%	72.97%	68.04%
TR - Nonresident	Admit	288	252	180	217	172	169
	Enrolled	148	150	102	116	94	88
	Yield	51.39%	59.52%	56.67%	53.46%	54.65%	52.07%
Total	Admit	2735	2318	2366	2606	2462	2264
	Enrolled	950	871	829	955	817	799
	Yield	34.73%	37.58%	35.04%	36.65%	33.18%	35.29%

**Funnel Report: New Applicant Headcount by Student Type**  
**Fall 2025 Week Ending 3/30/25 vs. Fall 2026 Week Ending 3/29/26**  
**25 Weeks Before Start of Term**

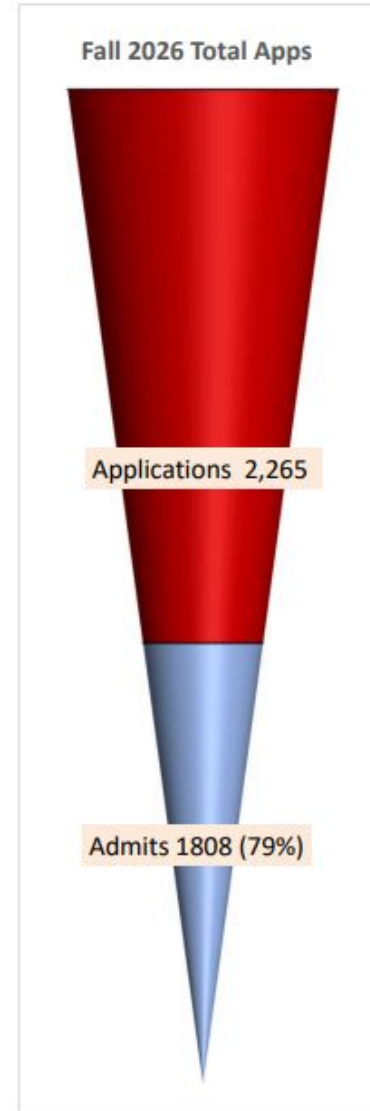
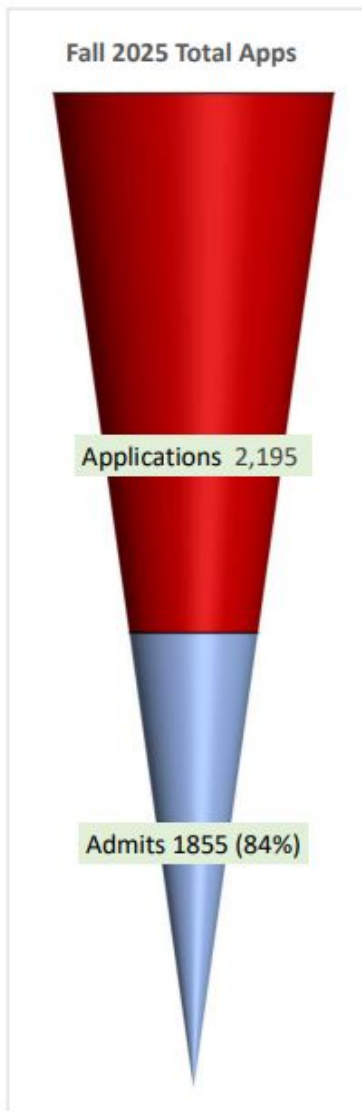
\*Fall 2026 Funnel as of 3/29/26

<b>Applications</b>				
<b>Student Type</b>	<b>Fall 2025</b>	<b>Fall 2026</b>	<b>Change</b>	<b>% Change</b>
Freshmen - Resident	977	1,025	48	4.9%
Freshmen - Nonresident	775	750	-25	-3.2%
Transfer - Resident	145	161	16	11.0%
Transfer - Nonresident	132	111	-21	-15.9%
Postbacs/Grads	166	218	52	31.3%
<b>Total Apps</b>	<b>2,195</b>	<b>2,265</b>	<b>70</b>	<b>3.2%</b>

<b>Admits</b>				
<b>Student Type</b>	<b>Fall 2025</b>	<b>Fall 2026</b>	<b>Change</b>	<b>% Change</b>
Freshmen - Resident	905	911	6	0.7%
Freshmen - Nonresident	694	649	-45	-6.5%
Transfer - Resident	110	112	2	1.8%
Transfer - Nonresident	84	77	-7	-8.3%
Postbacs/Grads	62	59	-3	-4.8%
<b>Total</b>	<b>1,855</b>	<b>1,808</b>	<b>-47</b>	<b>-2.5%</b>

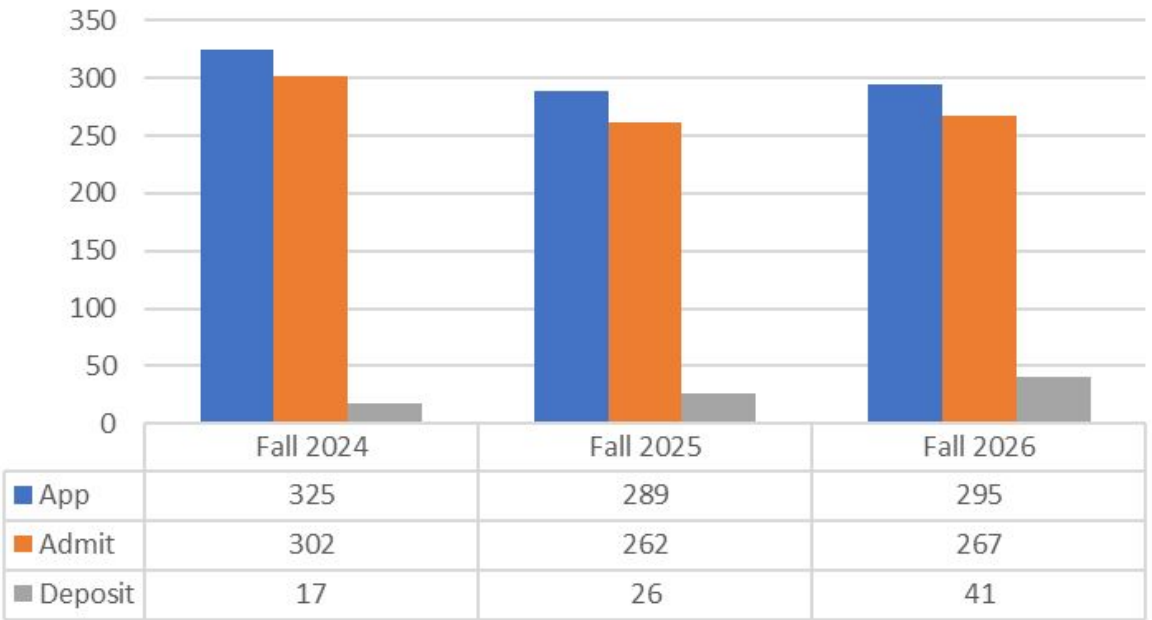
<b>Confirmed</b>				
<b>Student Type</b>	<b>Fall 2025</b>	<b>Fall 2026</b>	<b>Change</b>	<b>% Change</b>
Freshmen - Resident	-	-	-	-
Freshmen - Nonresident	-	-	-	-
Transfer - Resident	-	-	-	-
Transfer - Nonresident	-	-	-	-
Postbacs/Grads	-	-	-	-
<b>Total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

<b>Enrolled</b>				
<b>Student Type</b>	<b>Fall 2025</b>	<b>Fall 2026</b>	<b>Change</b>	<b>% Change</b>
Freshmen - Resident	-	-	-	-
Freshmen - Nonresident	-	-	-	-
Transfer - Resident	-	-	-	-
Transfer - Nonresident	-	-	-	-
Postbacs/Grads	-	-	-	-
<b>Total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

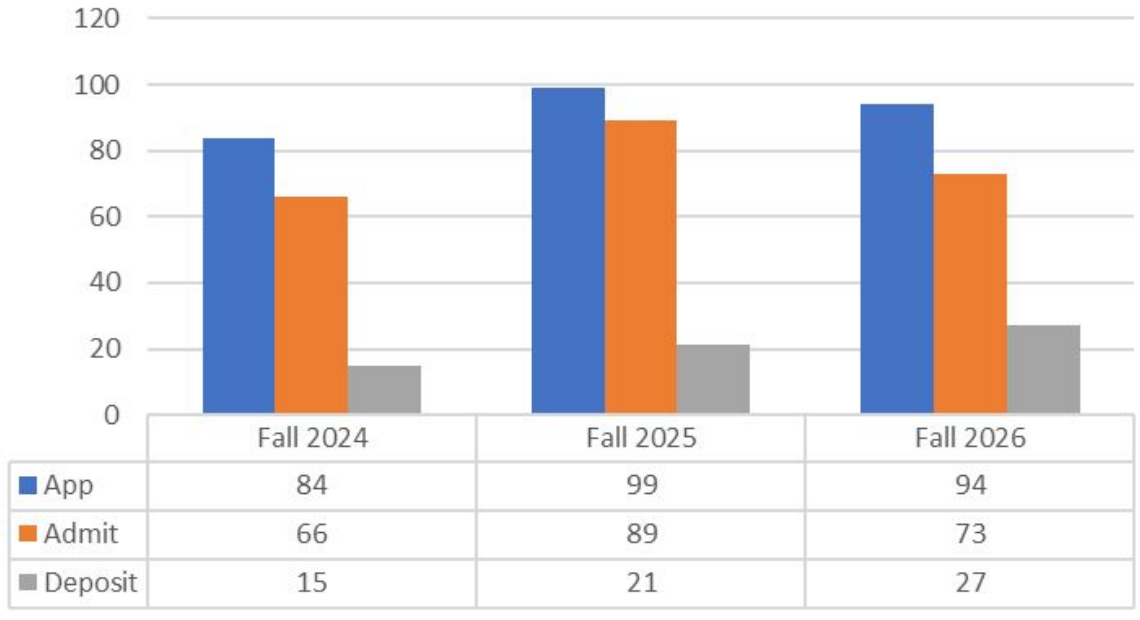


# Data Share & RCC Populations

K-12 Datashare (YTD as of 4/2/2026)

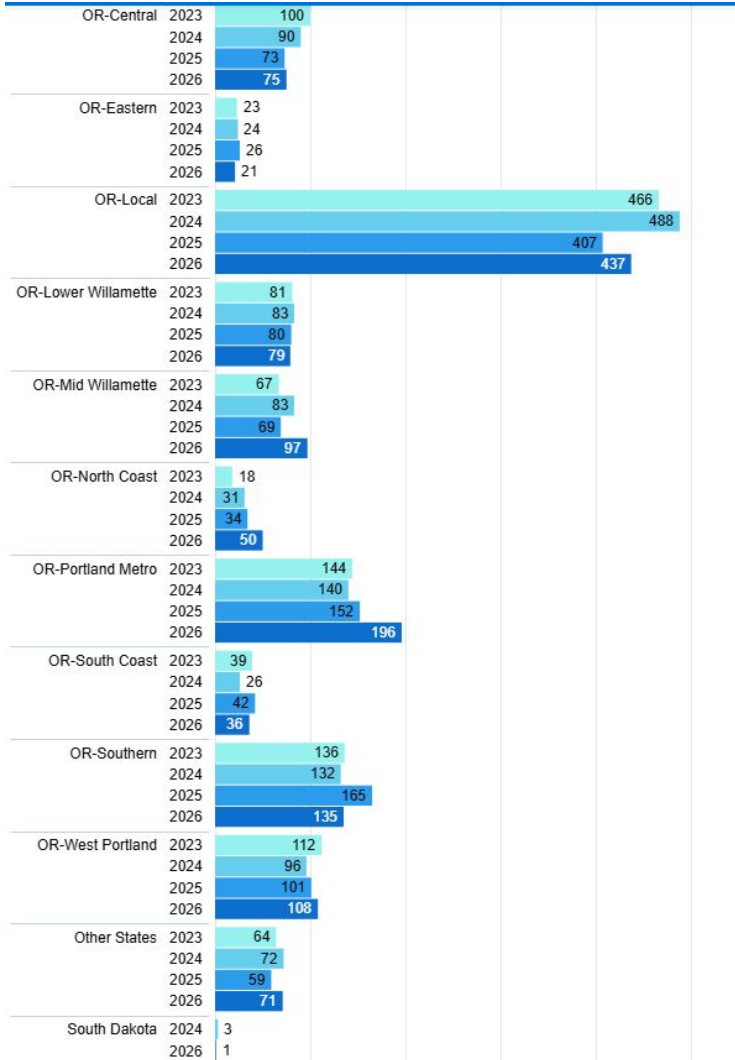


RCC (YTD as of 4/2/2026)

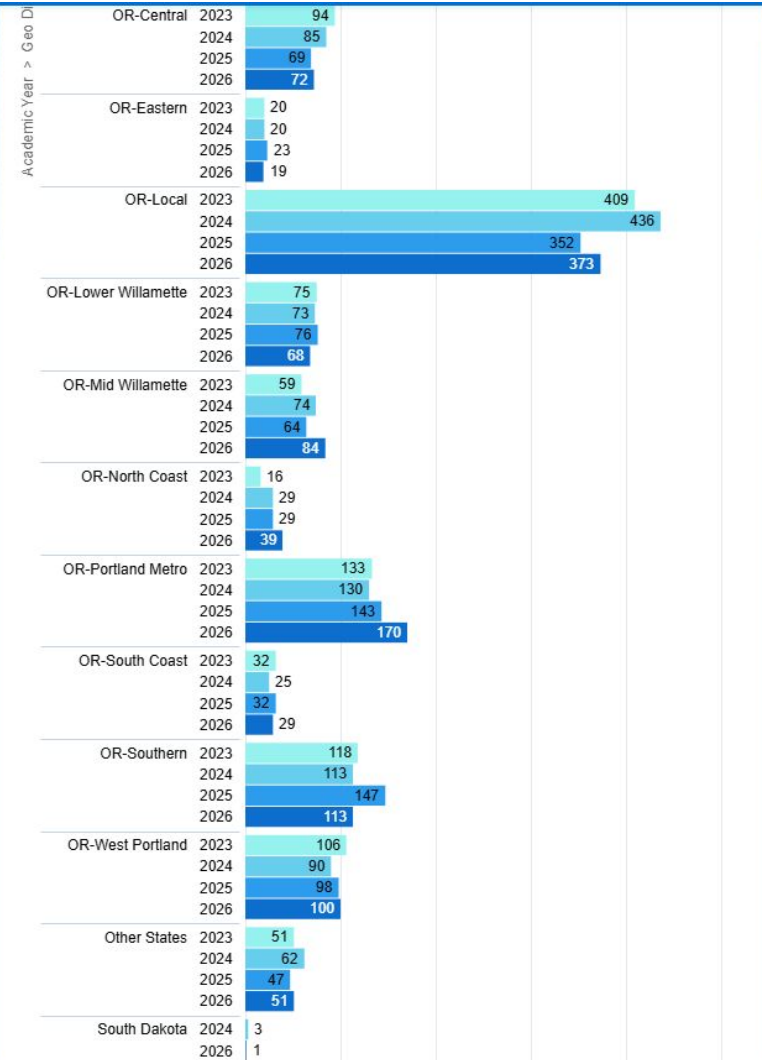


# Funnel by Oregon Recruitment Territories (YTD as of 4/3/26)

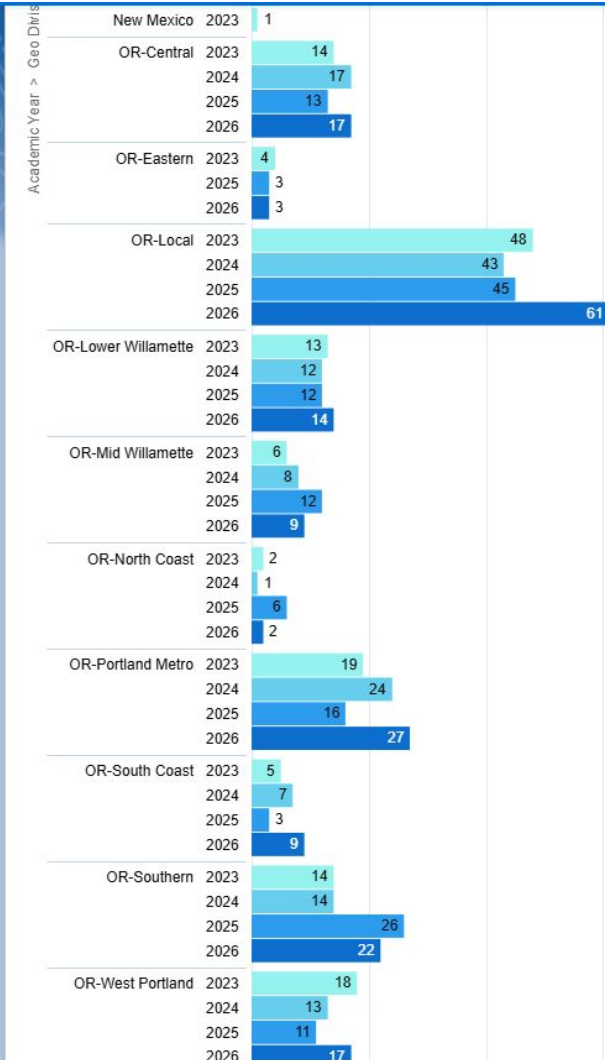
## Applications



## Admits

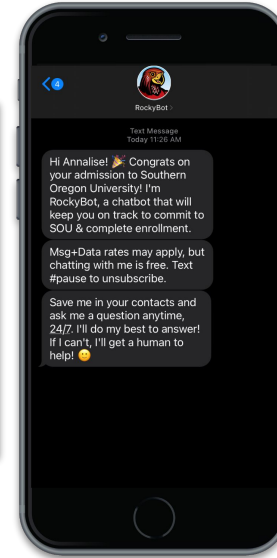
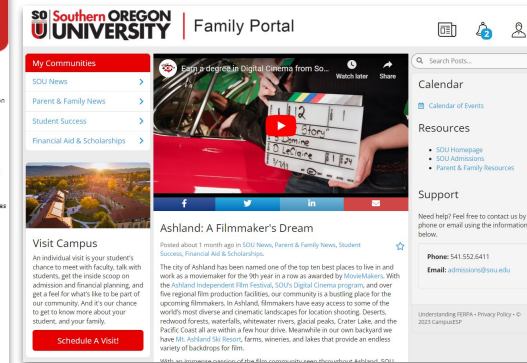
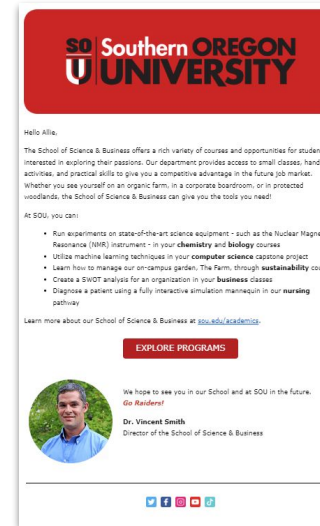


## Confirmed



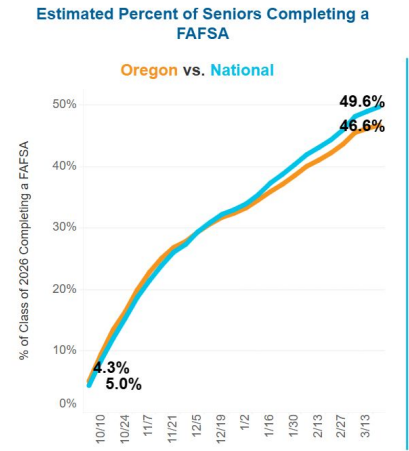
# Office of Admissions

- 55 application workshops, 222 HS/CC visits, 149 college fairs
- Workday Admissions Application Update
- Common App operational on Feb 2, has generated 150 applications (85 from OR). Already generated 6-7% of total UG apps for 2026
- OSF Partnership: Preview Day; QR and free app promo code on Playbill; Kiosk; Tours/Swag
- Upcoming events: Preview Day April 10th; Admitted Student Days; Con't Application Workshops; New Student Onboarding
- RCC/SOU Partnership MOU
- New \$100 Advanced Tuition Deposit (workflow item in Workday has improved funnel fluidity)
- Re-Enroll Campaign (TRU's + PSU)
- Activated AI in chatbot "Rockybot" for faster and more accurate responses to students



# Financial Aid

- Rob Kever, new position as **Scholarship Coordinator**
- Workday Updates
  - FA is live in Workday!!!
  - Pulled 6036 ISIR's into Workday for 26-27 (4023 25-26 YTD)
  - Current and incoming students are currently being packaged
  - Responding to action items, etc.
- Peer Mentors
  - Phone outreach
  - 1 on 1 assistance
  - Events and Tabling
  - Presentations
- Created FAQ updates on FA website (<https://sou.edu/financial-aid/>)



## One Big Beautiful Bill Act (OBBBA or OB3)

Signed into law: July 4, 2025

The [One Big Beautiful Bill Act](#) (OBBBA) is a new federal law that affects funding for many programs. While the law covers a wide range of programs, this page focuses on financial aid. These changes are subject to change pending final regulatory text, which is expected in the first half of 2026. We're waiting for guidance from the Department of Education on how, when, and for whom the new rules will apply.

This page will be updated as we learn more about the OBBBA. Check back regularly for updates and answers to your questions. If you have a question not answered below, please feel free to email us at [finaid@sou.edu](mailto:finaid@sou.edu).

- + Federal Pell Grants
- + Federal Direct Loans for Undergraduates
- + Federal Direct Loans for Graduate Students
- + Parent PLUS and Grad PLUS Loans

# Outreach & Engagement

## Completed:

- ASC: Winter Term - 2nd largest term in ASC History by course headcount (2,743) and SCH (10,430); Largest by revenue
- Early Entry: Spring Term - Largest ever headcount & SCH for EE this term. Record enrollment year for EE: 156% ↑ in headcount; 205% ↑ in SCH (compared to 24/25)
- Latina Family Day: 31 families representing 9 schools attended.
- Cesar Chavez Leadership Conference: 210 students attended from 14 high schools (new schools this year: Marshfield, Butte Falls, Lost River)
- Brain Bowl: 25 High School Teams from Klamath, Jackson, Josephine, and Curry Counties participated. 21 Middle School teams from Jackson and Josephine County schools participated.
- Best of the Best Art Show: Opened on Friday, April 3 at Grants Pass Art Museum. 16 schools participated including first time participant Sutherlin High School.



# Outreach & Engagement, con't

## Ongoing:

- Pirates to Raiders: 111 Participants in grades 8-12 including 22 8th graders who recently entered the program.
- All My Relations
  - Serving 63 Indigenous families from seven states (221 individuals). 117 youth received grade appropriate school supplies at the very beginning of the academic year.
  - In person, more than 80 youth participated in a three-day art camp hosted in Warm Springs culminating in a community art showcase.
  - Three family holiday events offered more than 120 individuals the opportunity to gather, make holiday ornaments, stockings, cards and gifts, and have family photos taken. Highlight was a five-generation family photo!

## Upcoming:

- ASC: Spring Term - 101 courses offered at Registration will conclude on 4/22
- English/Writing and Social Sciences departments will host their on-campus ASC instructor annual events for high school teachers on April 11 & May 22
- Applications for residential Summer Camps (ACADEMY, Konaway Nika Tillicum, Black Youth Summer Institute, Academia Latina and Leadership) are open and camps are starting to accept students.
- Summer Better Than Others day camps registration opened on 4/1. Offerings include Rock the Wall!, ESports, Ceramics, Entrepreneurship and Website Development.
- High School Brain Bowl finals will air on SOPBS Sunday, April 26.



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# Questions?

# Enrollment Management Report

# Enrollment Management Report



Zac Olson & Dr. Carrie Vath  
April 16, 2026

# Executive Report (Winter 2026)

**Student Headcounts**  
**Winter 2025 Week Ending 3/30/25 vs. Winter 2026 Week Ending 3/29/26**  
**12 Weeks After Start of Term**

	Winter 2025	Winter 2026	Change	% Change	Winter 2025 End of Term	Change	% Change
New Freshmen	25	15	-10	-40.0%	25	-10	-40.0%
New Transfers	62	53	-9	-14.5%	62	-9	-14.5%
New PostBacs/Graduates	56	43	-13	-23.2%	56	-13	-23.2%
<b>Subtotal - New Students</b>	<b>143</b>	<b>111</b>	<b>-32</b>	<b>-22.4%</b>	<b>143</b>	<b>-32</b>	<b>-22.4%</b>
Continuing Undergraduate Students	2,418	2,308	-110	-4.5%	2,418	-110	-4.5%
Continuing Graduate Students	386	412	26	6.7%	386	26	6.7%
Returning Undergraduate Students	56	50	-6	-10.7%	56	-6	-10.7%
Returning Graduate Students	38	32	-6	-15.8%	38	-6	-15.8%
Non-Admitted Students	2,296	2,524	228	9.9%	2,296	228	9.9%
<b>Grand Total - Headcount</b>	<b>5,337</b>	<b>5,437</b>	<b>100</b>	<b>1.9%</b>	<b>5,337</b>	<b>100</b>	<b>1.9%</b>
<b>Grand Total - FTE</b>	<b>3,307</b>	<b>3,294</b>	<b>-13</b>	<b>-0.4%</b>	<b>3,307</b>	<b>-13</b>	<b>-0.4%</b>
Resident	4,225	4,441	216	5.1%	4,225	216	5.1%
Non-resident	1,112	996	-116	-10.4%	1,112	-116	-10.4%
International	44	41	-3	-6.8%	44	-3	-6.8%
American Indian/Alaskan Native	52	51	-1	-1.9%	52	-1	-1.9%
Asian	65	52	-13	-20.0%	65	-13	-20.0%
Black/African American	61	53	-8	-13.1%	61	-8	-13.1%
Hispanic/Latino	452	390	-62	-13.7%	452	-62	-13.7%
Pacific Islander	23	20	-3	-13.0%	23	-3	-13.0%
North African, Middle eastern, Other	34	32	-2	-5.9%	34	-2	-5.9%
Two or More Races	343	311	-32	-9.3%	342	-31	-9.1%
<b>Subtotal - Students of Color</b>	<b>1,030</b>	<b>909</b>	<b>-121</b>	<b>-11.7%</b>	<b>1,029</b>	<b>-120</b>	<b>-11.7%</b>
White	1,893	1,659	-234	-12.4%	1,894	-235	-12.4%
Unknown	2,370	2,828	458	19.3%	2,370	458	19.3%
Alaska	27	27	-	0.0%	27	-	0.0%
California	676	589	-87	-12.9%	672	-83	-12.4%
Hawaii	28	28	-	0.0%	28	-	0.0%
Idaho	21	31	10	47.6%	20	11	55.0%
Washington	121	100	-21	-17.4%	121	-21	-17.4%
All Other States	197	192	-5	-2.5%	194	-2	-1.0%



**Undergraduate Course SCH by Department**  
**Winter 2025 Week Ending 3/30/25 vs. Winter 2026 Week Ending 3/29/26**  
**12 Weeks After Start of Term**

Department	Winter 2025	Winter 2026	Change	% Change
Art and Art History	1,691	1,511	-180	-10.6%
Athletics	327	304	-23	-7.0%
Biology	2,038	2,229	191	9.4%
Business Administration	3,603	3,596	-7	-0.2%
Chemistry & Physics	1,334	1,292	-42	-3.1%
Communication, Media & Cinema	2,805	2,603	-202	-7.2%
Computer Science	704	688	-16	-2.3%
Creative Writing	506	333	-173	-34.2%
Criminology & Criminal Justice	1,332	1,058	-274	-20.6%
Economics	880	932	52	5.9%
Education	1,890	1,968	78	4.1%
Emerging Media & Digital Arts	968	984	16	1.7%
English Studies	1,859	2,060	201	10.8%
Env. Science, Policy, & Sust	1,178	1,427	249	21.1%
Gend,Sexuality,Women's Studies	264	306	42	15.9%
Health & Exercise Science	1,843	1,817	-26	-1.4%
Healthcare Administration	40	8	-32	-80.0%
History	2,896	2,320	-576	-19.9%
Honors College	322	282	-40	-12.4%

Department	Winter 2025	Winter 2026	Change	% Change
Innovation and Leadership	-	28	28	
International Studies	12	72	60	500.0%
Library & Information Science	-	108	108	
Mathematics	3,842	3,823	-19	-0.5%
Military Science	75	74	-1	-1.3%
Music	1,149	965	-184	-16.0%
Native American Studies	176	168	-8	-4.5%
Outdoor Adventure Leadership	619	437	-182	-29.4%
Philosophy	484	432	-52	-10.7%
Power & Politics	820	688	-132	-16.1%
Psychology	3,141	3,169	28	0.9%
Sociology & Anthropology	801	1,017	216	27.0%
Spanish & American Sign Lang.	632	716	84	13.3%
Success At Southern	27	29	2	7.4%
Theatre	2,009	2,110	101	5.0%
UGS - WR 122/Study Abroad/Bridge	4,158	3,471	-687	-16.5%
University Seminar	-	-	-	
<b>All Undergraduate SCH</b>	<b>44,425</b>	<b>43,025</b>	<b>-1400</b>	<b>-3.2%</b>

**Graduate Course SCH by Department**  
**Winter 2025 Week Ending 3/30/25 vs. Winter 2026 Week Ending 3/29/26**  
**12 Weeks After Start of Term**

Department	Winter 2025	Winter 2026	Change	% Change
Art and Art History	-	-	-	
Biology	-	-	-	
Business Administration	192	236	44	22.9%
Chemistry	-	-	-	
Communication, Media & Cinema	4	8	4	100.0%
Computer Science	-	-	-	
Creative Writing	-	-	-	
Criminology & Criminal Justice	-	-	-	
Economics	-	-	-	
Education	1,374	1,383	9	0.7%
Emerging Media & Digital Arts	-	-	-	
English Studies	4	-	-4	-100.0%
Env. Science, Policy, & Sust	-	8	8	
Gend,Sexuality,Women's Studies	-	-	-	
Health & Exercise Science	-	8	8	
Health, P.E., & Leadership	-	-	-	
Healthcare Administration	-	-	-	
History	-	-	-	
Honors College	-	-	-	
Innovation and Leadership	-	-	-	
International Studies	-	-	-	

Department	Winter 2025	Winter 2026	Change	% Change
Library Science	-	-	-	
Master in Bus. Administration	849	892	43	5.1%
Masters in Interdisc. Studies	-	-	0	
Master in Management	-	-	0	
Master in Mental Health Cnslng	608	722	114	
Mathematics	-	-	0	
Military Science	-	-	0	
Music	-	-	0	
Native American Studies	-	-	0	
Outdoor Adventure Leadership	115	86	-29	-25.2%
Philosophy	-	-	0	
Physical Education Activities	-	-	0	
Physics	-	-	0	
Political Science	-	-	0	
Psychology	12	-	-12	-100.0%
STEM	-	-	0	
Sociology & Anthropology	-	-	0	
Theatre	21	30	9	42.9%
Spanish & American Sign Lang.	50	41	-9	-18.0%
<b>All Graduate SCH</b>	<b>3,229</b>	<b>3,414</b>	<b>185</b>	<b>5.7%</b>

**SCH by Student Level Within Tuition Category**  
**Winter 2025 Week Ending 3/30/25 vs. Winter 2026 Week Ending 3/29/26**  
**12 Weeks After Start of Term**

Tuition Category	Winter 2025	Winter 2026	Change	% Change
UG WUE	7,371	6,536	-835	-11.3%
UG Resident	15,999	15,450	-549	-3.4%
UG Jack/Jo Pledge	322	266	-56	-17.4%
UG Non-resident	302	313	11	3.6%
UG Online	9,404	9,417	13	0.1%
<b>Subtotal - Undergraduates</b>	<b>33,398</b>	<b>31,982</b>	<b>-1,416</b>	<b>-4.2%</b>
GR Resident	677	768	91	13.4%
GR Non-resident	161	147	-14	-8.7%
GR AP MBA Online	734	805	71	9.7%
GR AP ED Online	596	684	88	14.8%
GR Online	142	127	-15	-10.6%
GR Education Differential	751	687	-64	-8.5%
<b>Subtotal - Graduates</b>	<b>3,061</b>	<b>3,218</b>	<b>157</b>	<b>5.1%</b>
<b>Subtotal - Core Revenue SCH</b>	<b>36,459</b>	<b>35,200</b>	<b>-1,259</b>	<b>-3.5%</b>
Staff Rates	246	371	125	50.8%
Waived Tuition	169	176	7	4.1%
Course Based Tuition	269	215	-54	-20.1%
Advanced Southern Credit	10,473	10,425	-48	-0.5%
Early Entry HS	38	54	16	42.1%
OLLI	931	1,711	780	83.8%
Staff Training & Development	-	-	-	
<b>Subtotal - Supplemental Revenue SCH</b>	<b>12,126</b>	<b>12,952</b>	<b>826</b>	<b>6.8%</b>
<b>Grand Total - SCH</b>	<b>48,585</b>	<b>48,152</b>	<b>-433</b>	<b>-0.9%</b>

# Executive Report (Spring 2026)

**Student Headcounts**  
**Spring 2025 Week Ending 3/30/25 vs. Spring 2026 Week Ending 3/29/26**  
**Week 0 - Start of Term**

	Spring 2025	Spring 2026	Change	% Change	Spring 2025 End of Term	Change	% Change
New Freshmen	16	10	-6	-37.5%	16	-6	-37.5%
New Transfers	39	28	-11	-28.2%	43	-15	-34.9%
New PostBacs/Graduates	50	37	-13	-26.0%	53	-16	-30.2%
<b>Subtotal - New Students</b>	<b>105</b>	<b>75</b>	<b>-30</b>	<b>-28.6%</b>	<b>112</b>	<b>-37</b>	<b>-33.0%</b>
Continuing Undergraduate Students	2,256	2,143	-113	-5.0%	2,322	-179	-7.7%
Continuing Graduate Students	402	400	-2	-0.5%	404	-4	-1.0%
Returning Undergraduate Students	59	48	-11	-18.6%	73	-25	-34.2%
Returning Graduate Students	25	20	-5	-20.0%	25	-5	-20.0%
Non-Admitted Students	145	149	4	2.8%	1,456	-1,307	-89.8%
<b>Grand Total - Headcount</b>	<b>2,992</b>	<b>2,835</b>	<b>-157</b>	<b>-5.2%</b>	<b>4,392</b>	<b>-1,557</b>	<b>-35.5%</b>
<b>Grand Total - FTE</b>	<b>2,411</b>	<b>2,285</b>	<b>-126</b>	<b>-5.2%</b>	<b>2,845</b>	<b>-560</b>	<b>-19.7%</b>
Resident	2,060	2,000	-60	-2.9%	3,369	-1,369	-40.6%
Non-resident	932	835	-97	-10.4%	1,023	-188	-18.4%
International	41	34	-7	-17.1%	43	-9	-20.9%
American Indian/Alaskan Native	49	46	-3	-6.1%	50	-4	-8.0%
Asian	51	50	-1	-2.0%	61	-11	-18.0%
Black/African American	51	44	-7	-13.7%	59	-15	-25.4%
Hispanic/Latino	383	345	-38	-9.9%	419	-74	-17.7%
Pacific Islander	21	21	-	0.0%	23	-2	-8.7%
North African, Middle eastern, Other	24	33	9	37.5%	28	5	17.9%
Two or More Races	291	267	-24	-8.2%	315	-48	-15.2%
<b>Subtotal - Students of Color</b>	<b>870</b>	<b>806</b>	<b>-64</b>	<b>-7.4%</b>	<b>955</b>	<b>-149</b>	<b>-15.6%</b>
White	1,541	1,431	-110	-7.1%	1,756	-325	-18.5%
Unknown	540	564	24	4.4%	1,638	-1,074	-65.6%
Alaska	28	24	-4	-14.3%	28	-4	-14.3%
California	525	470	-55	-10.5%	600	-130	-21.7%
Hawaii	26	25	-1	-3.8%	31	-6	-19.4%
Idaho	18	27	9	50.0%	18	9	50.0%
Washington	112	98	-14	-12.5%	116	-18	-15.5%
All Other States	180	170	-10	-5.6%	185	-15	-8.1%



**Undergraduate Course SCH by Department**  
**Spring 2025 Week Ending 3/30/25 vs. Spring 2026 Week Ending 3/29/26**  
**Week 0 - Start of Term**

Department	Spring 2025	Spring 2026	Change	% Change
Art and Art History	1,515	1,550	35	2.3%
Athletics	332	262	-70	-21.1%
Biology	1,242	1,328	86	6.9%
Business Administration	3,681	3,547	-134	-3.6%
Chemistry & Physics	812	684	-128	-15.8%
Communication, Media & Cinema	2,337	2,345	8	0.3%
Computer Science	912	856	-56	-6.1%
Creative Writing	404	350	-54	-13.4%
Criminology & Criminal Justice	1,438	1,585	147	10.2%
Economics	592	600	8	1.4%
Education	1,875	1,798	-77	-4.1%
Emerging Media & Digital Arts	864	772	-92	-10.6%
English Studies	607	503	-104	-17.1%
Env. Science, Policy, & Sust	904	784	-120	-13.3%
Gen,Sexuality,Women's Studies	260	318	58	22.3%
Health & Exercise Science	1,704	1,556	-148	-8.7%
Healthcare Administration	36	12	-24	-66.7%
History	548	536	-12	-2.2%
Honors College	324	333	9	2.8%

Department	Spring 2025	Spring 2026	Change	% Change
Innovation and Leadership	68	28	-40	-58.8%
International Studies	24	4	-20	-83.3%
Library & Information Science	-	84	84	
Mathematics	1,249	1,216	-33	-2.6%
Military Science	80	58	-22	-27.5%
Music	837	976	139	16.6%
Native American Studies	124	116	-8	-6.5%
Outdoor Adventure Leadership	372	335	-37	-9.9%
Philosophy	560	452	-108	-19.3%
Power & Politics	189	80	-109	-57.7%
Psychology	3,193	2,758	-435	-13.6%
Sociology & Anthropology	815	515	-300	-36.8%
Spanish & American Sign Lang.	356	404	48	13.5%
Success At Southern	9	8	-1	-11.1%
Theatre	1,988	2,038	50	2.5%
UGS - WR 122/Study Abroad/Bridge	1,611	1,439	-172	-10.7%
University Seminar	-	-	-	
<b>All Undergraduate SCH</b>	<b>31,862</b>	<b>30,230</b>	<b>-1632</b>	<b>-5.1%</b>

**Graduate Course SCH by Department**  
**Spring 2025 Week Ending 3/30/25 vs. Spring 2026 Week Ending 3/29/26**  
**Week 0 - Start of Term**

Department	Spring 2025	Spring 2026	Change	% Change
Art and Art History	-	-	-	
Biology	-	-	-	
Business Administration	320	412	92	28.8%
Chemistry	-	-	-	
Communication, Media & Cinema	16	12	-4	-25.0%
Computer Science	-	-	-	
Creative Writing	-	-	-	
Criminology & Criminal Justice	-	-	-	
Economics	-	-	-	
Education	1,514	1,322	-192	-12.7%
Emerging Media & Digital Arts	-	-	-	
English Studies	-	-	-	
Env. Science, Policy, & Sust	9	8	-1	-11.1%
Gend,Sexuality,Women's Studies	-	-	-	
Health & Exercise Science	-	16	16	
Health, P.E., & Leadership	-	-	-	
Healthcare Administration	-	-	-	
History	-	-	-	
Honors College	-	-	-	
Innovation and Leadership	-	-	-	
International Studies	-	-	-	

Department	Spring 2025	Spring 2026	Change	% Change
Library Science	-	-	-	
Master in Bus. Administration	828	634	-194	-23.4%
Masters in Interdisc. Studies	-	-	0	
Master in Management	-	-	0	
Master in Mental Health Cnslng	604	728	124	
Mathematics	4	-	-4	-100.0%
Military Science	-	-	0	
Music	-	-	0	
Native American Studies	-	-	0	
Outdoor Adventure Leadership	101	73	-28	-27.7%
Philosophy	-	-	0	
Physical Education Activities	-	-	0	
Physics	-	-	0	
Political Science	-	-	0	
Psychology	4	-	-4	-100.0%
STEM	-	-	0	
Sociology & Anthropology	-	-	0	
Theatre	-	-	0	
Spanish & American Sign Lang.	21	26	5	23.8%
<b>All Graduate SCH</b>	<b>3,421</b>	<b>3,231</b>	<b>-190</b>	<b>-5.6%</b>

**SCH by Student Level Within Tuition Category**  
**Spring 2025 Week Ending 3/30/25 vs. Spring 2026 Week Ending 3/29/26**  
**Week 0 - Start of Term**

Tuition Category	Spring 2025	Spring 2026	Change	% Change
UG WUE	6,868	5,781	-1,087	-15.8%
UG Resident	14,652	13,834	-818	-5.6%
UG Jack/Jo Pledge	350	209	-141	-40.3%
UG Non-resident	294	282	-12	-4.1%
UG Online	9,263	9,575	312	3.4%
<b>Subtotal - Undergraduates</b>	<b>31,427</b>	<b>29,681</b>	<b>-1,746</b>	<b>-5.6%</b>
GR Resident	677	793	116	17.1%
GR Non-resident	144	142	-2	-1.4%
GR AP MBA Online	840	726	-114	-13.6%
GR AP ED Online	672	647	-25	-3.7%
GR Online	85	78	-7	-8.2%
GR Education Differential	834	690	-144	-17.3%
<b>Subtotal - Graduates</b>	<b>3,252</b>	<b>3,076</b>	<b>-176</b>	<b>-5.4%</b>
<b>Subtotal - Core Revenue SCH</b>	<b>34,679</b>	<b>32,757</b>	<b>-1,922</b>	<b>-5.5%</b>
Staff Rates	243	305	62	25.5%
Waived Tuition	191	155	-36	-18.8%
Course Based Tuition	144	139	-5	-3.5%
Advanced Southern Credit	-	-	-	
Early Entry HS	26	105	79	303.8%
OLLI	-	1	1	
Staff Training & Development	-	-	-	
<b>Subtotal - Supplemental Revenue SCH</b>	<b>604</b>	<b>705</b>	<b>101</b>	<b>16.7%</b>
<b>Grand Total - SCH</b>	<b>35,283</b>	<b>33,462</b>	<b>-1,821</b>	<b>-5.2%</b>

# Top Majors Spring 2026 (as of 4/3/2026)

<u>UG Major</u>	<u>Count</u>
Business Administration	374
Psychology	271
Education	168
Theatre	161
Health & Exercise Science	142
Communication, Media & Cinema	142
Biology	125
Criminology & Criminal Justice	109
Emerging Media + Design	105
Art & Art History	65
Environmental Science, Policy & Sustainability	64
English Studies	58

<u>GR Major</u>	<u>Count</u>
Business Administration	188
Education	167
Clinical Mental Health Counseling	54
Spanish & American Sign Language	26
Outdoor Adventure Leadership	7

## Retention & Persistence- Full-time First-time Freshman (as of 4/3/2026)

Fall to Fall Retention Rate		All UG	Fall Freshman Cohort*
Fall 2025		79.9%	68.9%
Fall 2024		79.0%	69.1%
Fall 2023		78.4%	68.6%
Fall 2022		76.2%	65.5%
Fall 2021		78.2%	66.7%

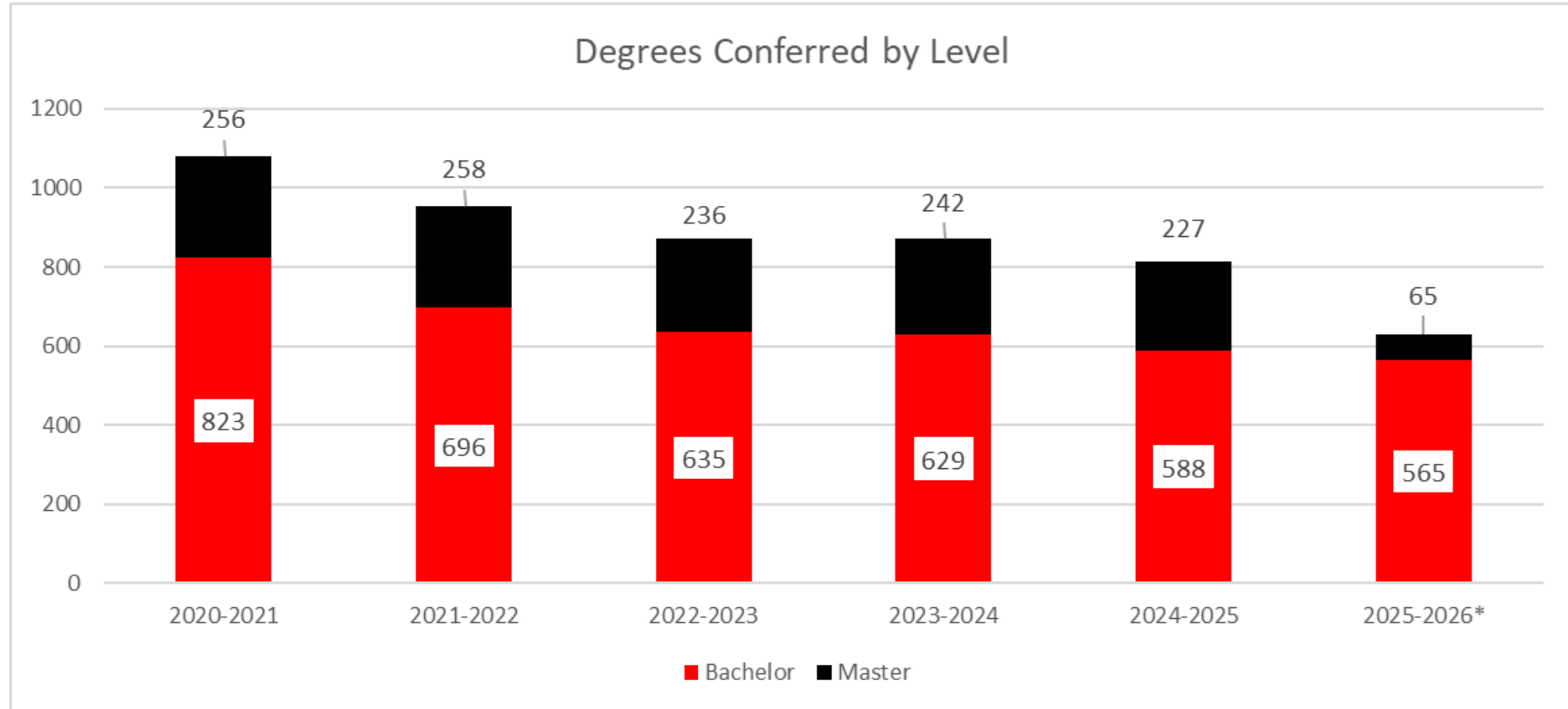
Fall to Spring Persistence Rate		All UG	
Fall 2025	*Data as of 4/3	85.7%	81.8%
Fall 2024		88.1%	85.9%
Fall 2023		87.4%	85.7%
Fall 2022		86.9%	84.2%
Fall 2021		83.6%	82.7%
Fall 2020		84.7%	80.9%

\*Fall Freshman Cohorts include incoming First-time Undergraduate Students

\*Fall to Fall 2025 refers to the % of Fall 2024 students who returned for Fall 2025 or graduated.

\*Fall to Spring 2025 refers to the % of Fall 2024 students who returned for Spring 2025 or graduated.

# Degree Completions (as of 4/3/2026)



## Spring-to-Fall Persistence (as of 4/3/2026)

Race/Ethnicity	2021	2022	2023	2024	2025
White	87.3%	87.6%	88.1%	88.6%	88.8%
Unknown or Other	83.0%	85.5%	84.1%	83.9%	87.9%
Hispanic	87.5%	87.1%	88.8%	88.2%	85.2%
Multiple	84.0%	85.9%	84.5%	84.4%	88.2%
Asian	90.6%	89.4%	84.9%	80.2%	86.4%
Black	78.1%	81.7%	69.8%	79.1%	69.0%
Native American	85.4%	85.7%	84.2%	78.9%	87.8%
Middle Eastern	80.0%	91.7%	85.0%	89.4%	70.0%
Pacific Islander	85.7%	75.9%	66.7%	76.9%	68.4%
Pell Recipient Students	89.2%	90.1%	88.2%	88.2%	85.6%
First Generation Students	91.0%	89.8%	90.8%	85.5%	81.2%
Underrepresented Minority Students	85.9%	86.6%	85.2%	86.1%	83.1%
Students with Disability	88.1%	88.9%	87.9%	87.1%	88.0%
All	86.6%	87.0%	86.6%	86.9%	87.7%

# Spring 2026 Student Demographics (as of 4/3/2026)

Student Class	Count	%	FT/PT Status	Count	%
Freshman (<45 credits)	307	11.21%	Full-time	2,078	75.87%
Sophomore (45-90 credits)	412	15.04%	Part-time	661	24.13%
Junior (90-134 credits)	609	22.23%			
Senior (135+ credits)	926	33.81%			
Graduate (Masters)	456	16.65%			
Post-Baccalaureate Non-Grad	29	1.06%			
Ethnic Groups	Count	%	Gender	Count	%
Asian	56	2.04%	F	1,434	52.35%
Black	42	1.53%	M	858	31.33%
Hispanic	346	12.63%	N*	447	16.32%
Middle Eastern	29	1.06%			
Multiple	274	10.00%			
Native American	48	1.75%			
Pacific Islander	22	0.80%			
Unknown or Other	528	19.28%			
White	1,394	50.89%			
Subpopulation	Count	%	Residency	Count	%
Pell Recipient Students	905	33.04%	Out of State	837	30.56%
Rural Students	631	23.04%	In State	1,902	69.44%
First Generation Students	664	24.24%			
Students with Veteran Status	166	6.06%			
Underrepresented Minority Students	572	20.88%			
Students with Disability	259	9.46%			
			Age Group	Count	%
			0-18	1	0.04%
			18-20	696	24.88%
			21-24	1,114	39.83%
			25-29	319	11.41%
			30-39	344	12.30%
			40-49	196	7.01%
			50+	127	4.54%

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

**Questions?**

# Review of Tuition and the Single Fee for AY 2026-27

Only selected slides in this section will be covered in the meeting.

# Mandatory Student Incidental Fees

Statute: ORS 352.105



Per ORS 352.105, public universities in Oregon listed in ORS 352.002 have to collect mandatory incidental fees at the request of their recognized student government by following a process established by that government. The student government is obligated to:

1. Collaborate in good faith with the university's governing board and president before finalizing the mandatory incidental fee collection process.
2. Apprise the board and president of the process and any subsequent changes.

The process may include a student body referendum. Once collected, these fees must be allocated by the recognized student government.

# Components and Procedures of the Mandatory Incidental Student Fees



1. Incidental Student Fee
2. Green Tag Fee
3. Student Recreation Center Fee
  - Shall be recommended by ASSOU to the university president
  - Shall be recommended by the president to the governing board
  - Shall be adopted by the governing board (not subject to HECC review or approval)

**Note:** By Student Referendum, the Student Recreation Center Fee may only be adjusted once every three years. This is that year!

# Mandatory Incidental Fees

- **Student Incidental Fee (including Green Tag)**
  - Recommended by SFBC to ASSOU Senate
  - Recommended by ASSOU to the President
  - Recommended by the President to the Governing Board
  - Adopted by the Governing Board – not included in HECC review/approval
- **Student Recreation Center Fee**
  - Recommended by RCAC to ASSOU Senate
  - Recommended by ASSOU to the President
  - Recommended by the President to the Governing Board
  - Adopted by the Governing Board – not included in HECC review/approval

## What About Housing?

- **Housing Room/Meal rates**
  - Set by University Administration, not included in HECC review/approval

**TAC DOES NOT DETERMINE INCIDENTAL FEES**

# Recommended Fee Schedule as Approved March 2026 by ASSOU



ACADEMIC YEAR (Fall, Winter, Spring terms) Rates								SUMMER RATES			
Mandatory Incidental Fees (Student Fee Process)	Current Fee Per SCH	Current Per AY (24 SCH)	Proposed Fee Per SCH	Proposed Per AY (24 SCH)	\$ ▲ Per Term	\$ ▲ per AY	% ▲	Prior Summer Rates	Proposed Summer Rates	\$ ▲ Per Term	% ▲
Student Incidental (per SCH)	\$57.00		\$59.50					\$12.00	\$12.53	\$0.53	
<i>Single Fee Cap</i>	\$456.00	\$1,368.00	\$476.00	\$1,428.00	\$20.00	\$60.00	4.39%	\$96.00	\$100.21	\$4.21	4.39%
Green Tag (per SCH)	\$1.75		\$1.75					\$1.75	\$1.75	\$0.00	
<i>Single Fee Cap</i>	\$14.00	\$42.00	\$14.00	\$42.00	\$0.00	\$0.00	0.00%	\$14.00	\$14.00	\$0.00	0.00%
Student Rec Center (per SCH)	\$14.75		\$16.25					\$14.75	\$16.25	\$1.50	
<i>Single Fee Cap</i>	\$118.00	\$354.00	\$130.00	\$390.00	\$12.00	\$36.00	10.17%	\$118.00	\$130.00	\$12.00	10.17%
Composite <b>Incidental</b> Fees (per SCH):	\$73.50	\$1,764.00	\$77.50	\$1,860.00	\$32.00	\$96.00	5.44%	\$73.50	\$77.50	\$4.00	5.44%

## Reminders:

1. By Student Referendum, the Student Recreation Center Fee may only be adjusted **once every three years**. This is that year!
2. The Incidental Fee is not subject to HECC review or approval.

# Tuition & Enrollment Fees Roadmap



- TAC Recommendations Summary
- Process and Board of Trustee involvement
- Tuition Advisory Council (TAC) Checklist
- Historical Tuition Review with Comparators
- Enrollment Context
- TAC's Tuition Recommendation
- President's Tuition Recommendation
- Mandatory Enrollment Fees Overview
- TAC's Enrollment Fee Recommendations
- President's Enrollment Fee Recommendations
- Cost of Attendance & Affordability Analysis

# Recommendations Summary



Tuition Category	Current SCH Rate Per Term	Current Tuition per Academic Year	Proposed SCH Rate Per Term	Proposed Tuition per Academic Year (45 SCH)	Increase \$ per Credit	Increase \$ per Academic Year	Increased %
Resident Undergrad	\$238.19	\$10,718.55	\$250.98	\$11,294.10	\$12.79	\$575.55	5.37%

Mandatory Enrollment Fees	Current Fee Per SCH	Current Per AY (24 SCH Cap)	Proposed Fee Per SCH	Proposed Per AY (24 SCH Cap)	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Health Services Fee	\$23.38	\$561.00	\$23.38	\$561.00	\$0.00	\$0.00	0.00%
Building Debt-Service Fee	\$6.50	\$156.00	\$6.50	\$156.00	\$0.00	\$0.00	0.00%
Technology Services Fee	\$4.09	\$98.25	\$4.09	\$98.25	\$0.00	\$0.00	0.00%

HECC - Composite Tuition & Mandatory Enrollment Fees	\$272.16	\$11,533.80	\$284.95	\$12,109.35	\$12.79	\$575.55	<b>4.99%</b>
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## Threshold Comparisons:

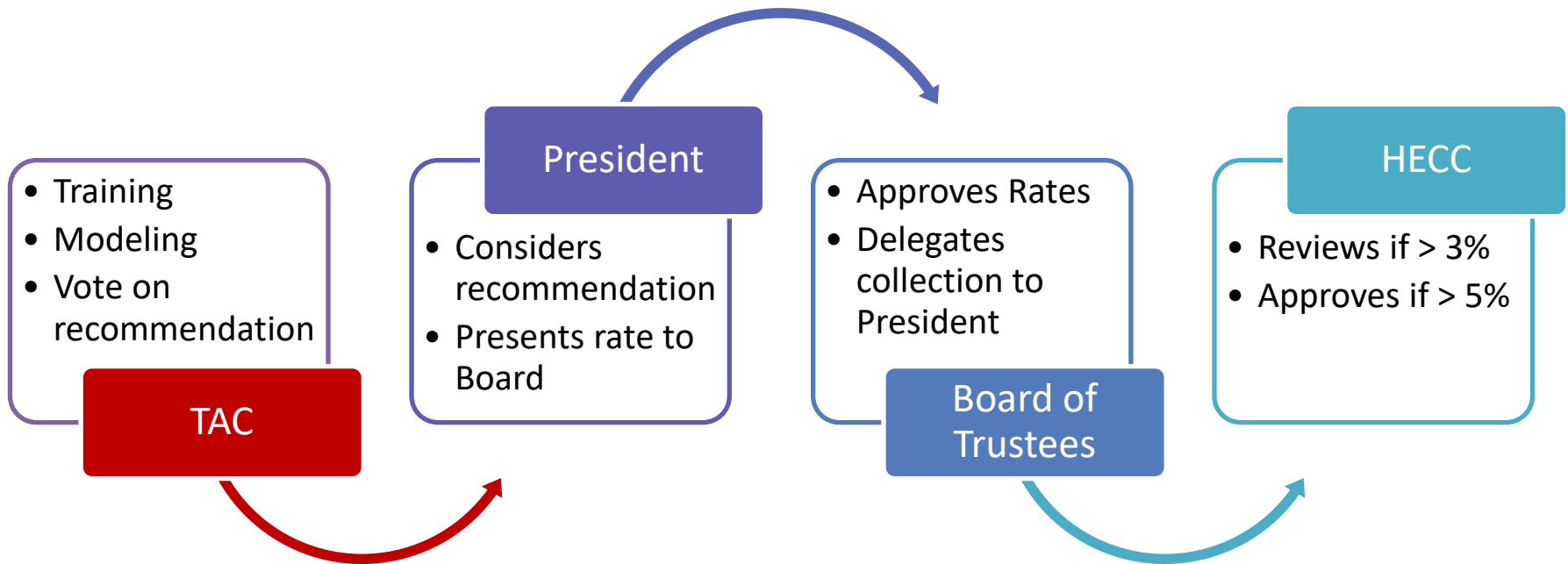
- Composite change at Single Fee Cap (24 SCH per Academic Year): **4.70%**
- Composite change at Financial Aid Level (36 SCH per Academic Year): **4.90%**

# Tuition Rate Setting Process

## ORS 352.103

- Each public university listed in [ORS 352.002 \(Public universities\)](#) shall have an advisory body to advise the president of the university on the president's **recommendations to the governing board** regarding **resident tuition** and mandatory enrollment fees for the upcoming academic year.

# Tuition Process Overview



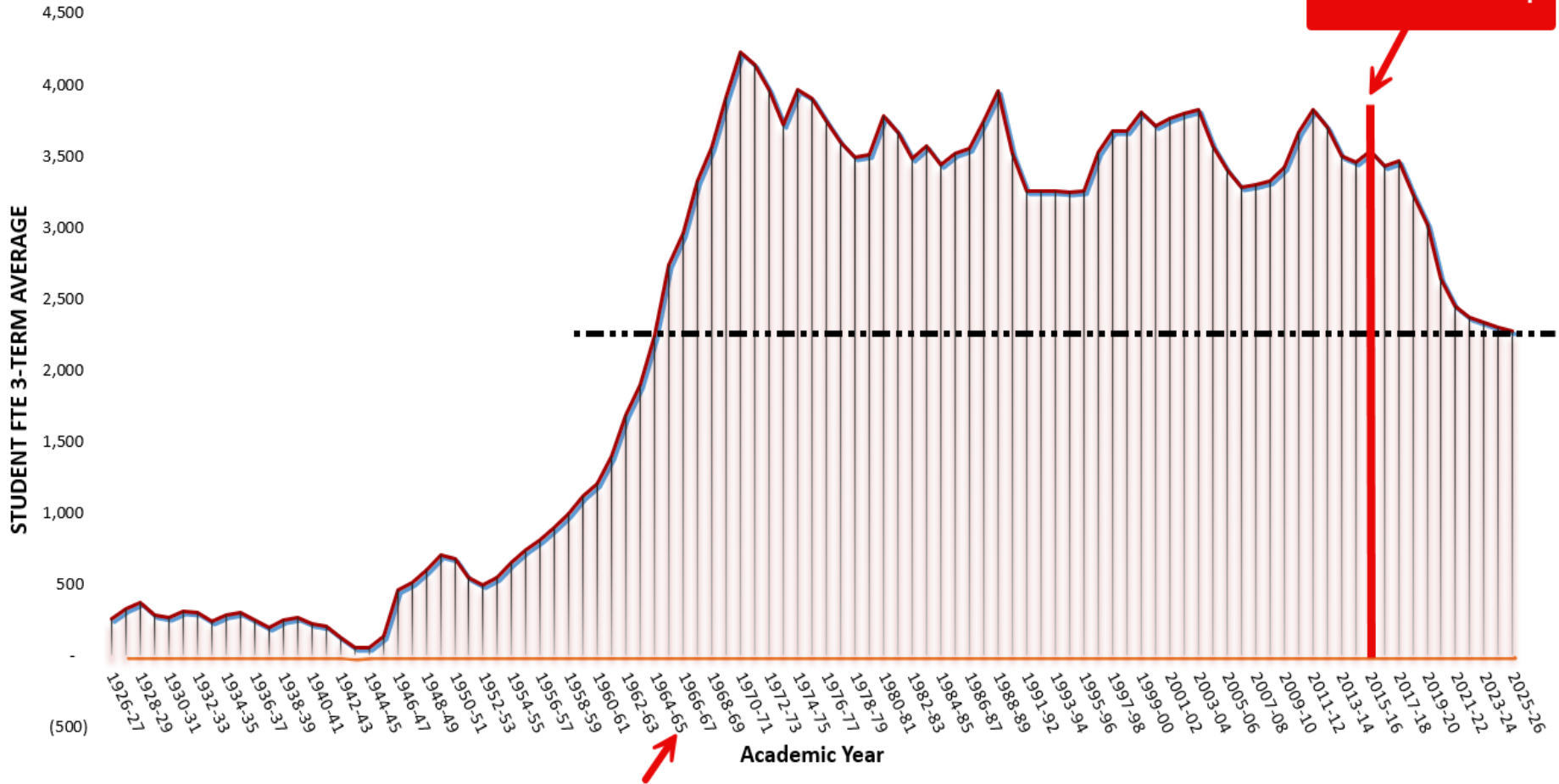
# ORS 352.103 Checklist

1. The University must create a shared governance body that advises the President concerning resident tuition and fees recommendations to be brought before the University's Board of Trustees;
  - A. **SOU chartered the Tuition Advisory Council.**
2. That body must provide a written document describing the role of the advisory council and be composed of at least:
  - a) Two Administrators
  - b) Two Faculty
  - c) Two Students representing Student Government
  - d) Two Students representing historically underserved students
3. The University must provide training on:
  - a) The budget of the university
  - b) The legislative appropriation processes
  - c) Data showing the relationship between tuition and fees to state appropriations
4. The University must provide the council with:
  - a) A plan for managing costs
  - b) A plan for how tuition and fees *could be decreased* if the university receives extra appropriations
5. If the council feels a recommendation greater than 5% annually is necessary, the council must document its consideration of:
  - a) The impact of that increase on students, especially historically underserved students
  - b) The impact of that increase on the mission of the University
  - c) Alternative scenarios involving smaller increases
6. The council must also:
  - a) Provide opportunities for students to actively participate in the process and deliberations
  - b) Provide a written report to the President with recommendations, deliberations and observations about tuition and fees for the upcoming academic year including any sub-reports requested by members of the council or other documentation produced or received by the council
7. The University must ensure that the process is described on the University's website and include downloadable materials such as:
  - a) The council's role and relationship to the Board
  - b) Any documentation, agendas and data considered during deliberations

# Undergraduate FTE History

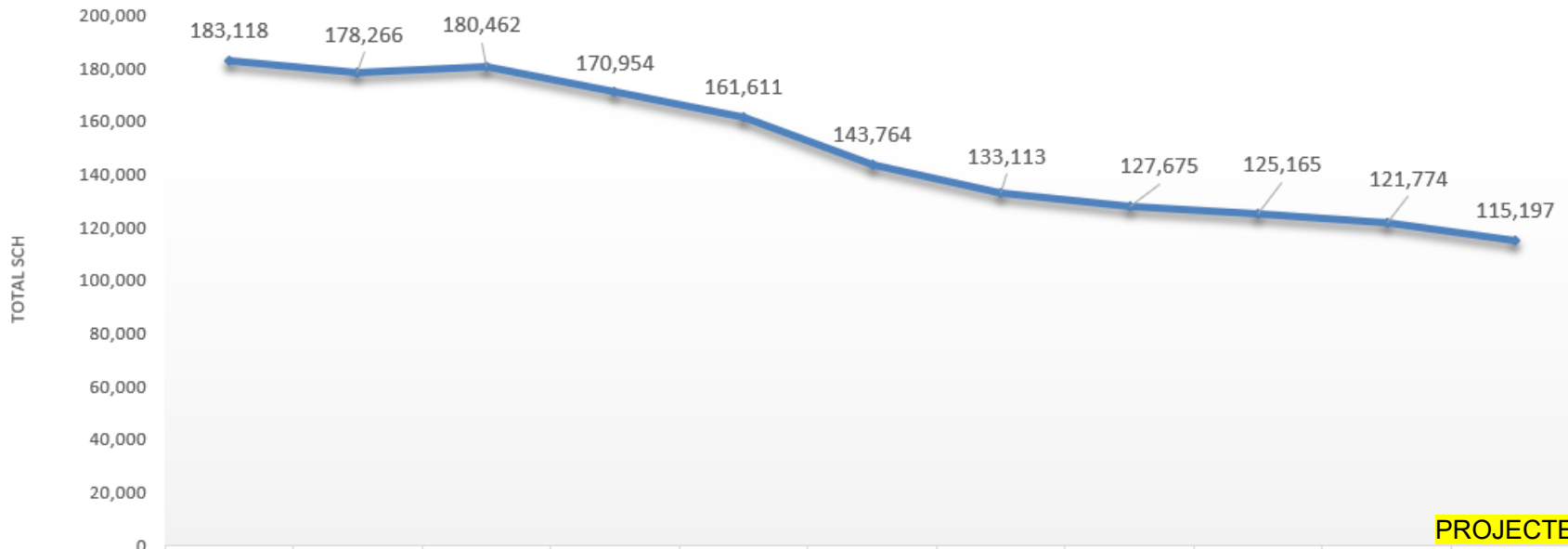
99 YEARS 3-TERM FTE

OUS Breakup



# Enrollment Context, SCH Trend

Total Student Credit Hours (SCH) Per Academic Year (AY)  
2015-2016 through 2025-2026 (projected)



	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
AY SCH Total	183,118	178,266	180,462	170,954	161,611	143,764	133,113	127,675	125,165	121,774	115,197
% Change From Prior AY	1.2%	-2.6%	1.2%	-5.3%	-5.5%	-11.0%	-7.4%	-4.1%	-2.0%	-2.7%	-5.4%
% Change Since 2015-16		-2.6%	-1.5%	-6.6%	-11.7%	-21.5%	-27.3%	-30.3%	-31.6%	-33.5%	-37.1%
SCH Change Since 2015-2016		(4,852.00)	(2,656.00)	(12,164.00)	(21,507.00)	(39,354.00)	(50,005.00)	(55,443.00)	(57,953.00)	(61,344.00)	(67,921.00)

ACADEMIC YEARS

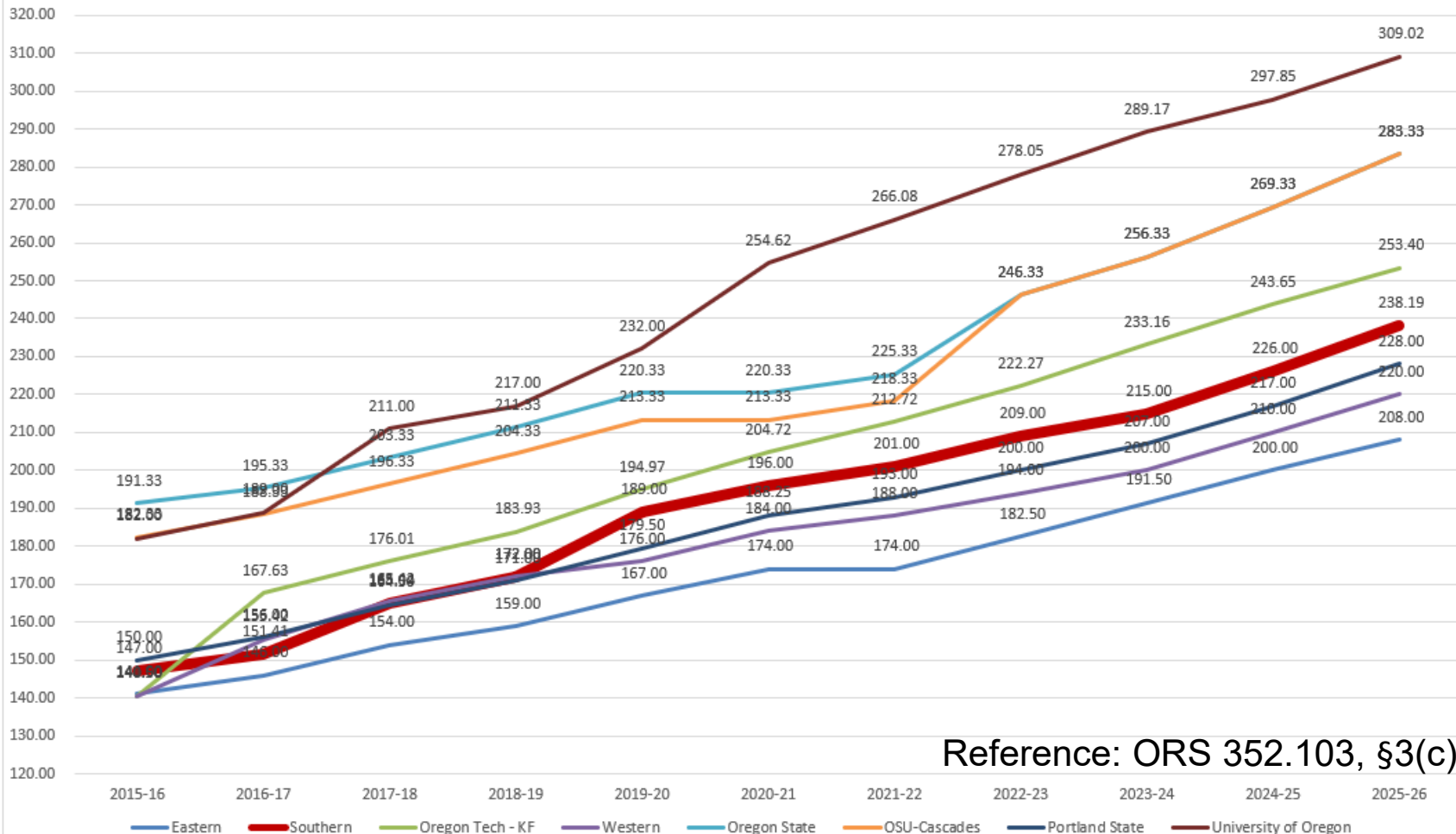
—●— AY SCH Total     
 % Change From Prior AY     
 % Change Since 2015-16     
 SCH Change Since 2015-2016

# Oregon Public Rate Comparison

Note: UG Resident – Incoming Only



## Oregon Resident UG Tuition AY2015 - AY2025



Reference: ORS 352.103, §3(c)

# UG Resident Tuition Rate Comparison

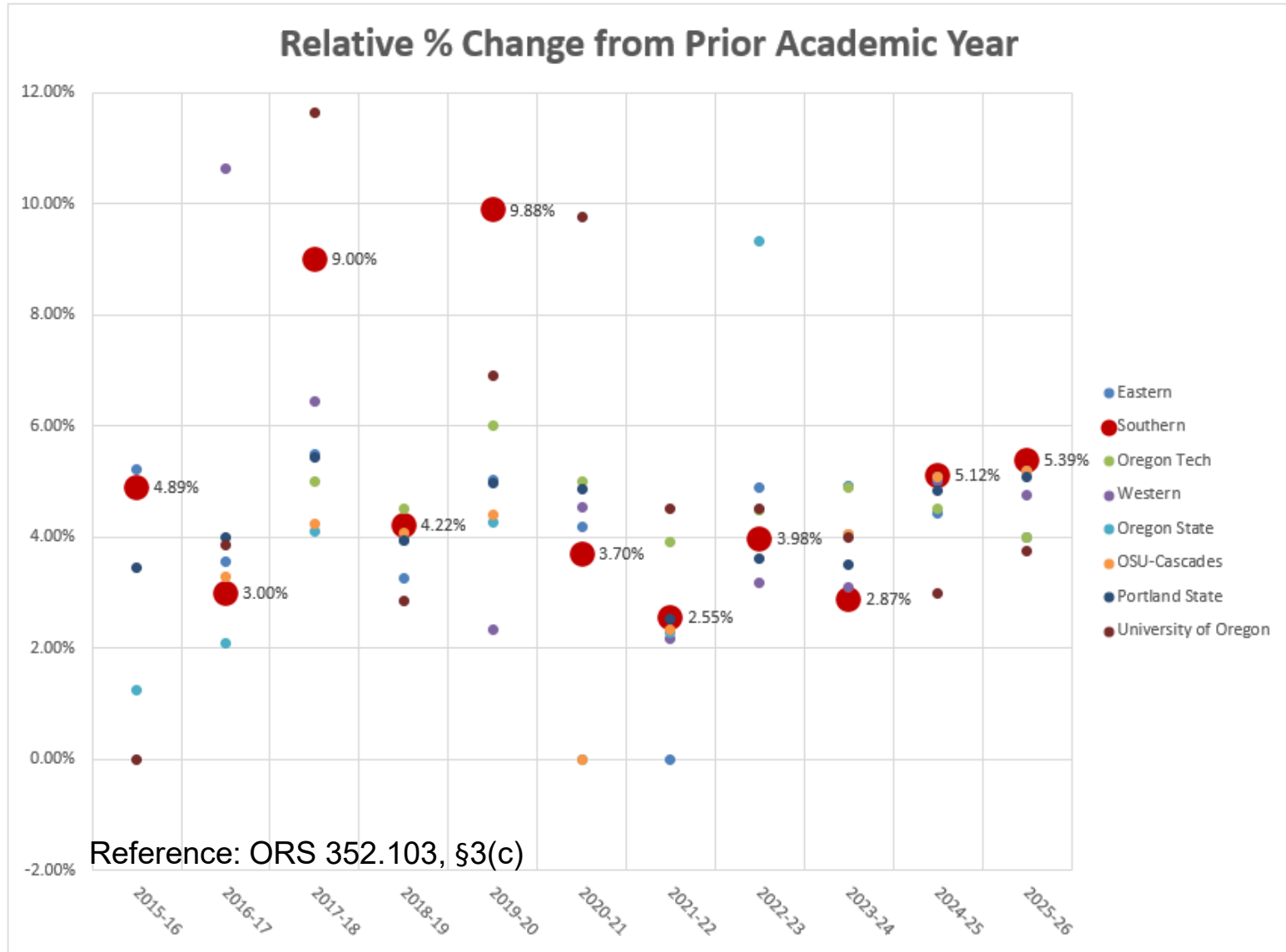
(AY 2018 – AY2025)



Institution	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Eastern	159.00	167.00	174.00	174.00	182.50	191.50	200.00	208.00
<b>Southern</b>	<b>172.00</b>	<b>189.00</b>	<b>196.00</b>	<b>201.00</b>	<b>209.00</b>	<b>215.00</b>	<b>226.00</b>	<b>238.19</b>
Oregon Tech	183.93	194.97	204.72	212.72	222.27	233.16	243.65	253.40
Western	172.00	176.00	184.00	188.00	194.00	200.00	210.00	220.00
Oregon State	211.33	220.33	220.33	225.33	246.33	256.33	269.33	283.33
OSU-Cascades	204.33	213.33	213.33	218.33	246.33	256.33	269.33	283.33
Portland State	171.00	179.50	188.25	193.00	200.00	207.00	217.00	228.00
University of Oregon	217.00	232.00	254.62	266.08	278.05	289.17	297.85	309.02

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Eastern	3.25%	5.03%	4.19%	0.00%	4.89%	4.93%	4.44%	4.00%
<b>Southern</b>	<b>4.22%</b>	<b>9.88%</b>	<b>3.70%</b>	<b>2.55%</b>	<b>3.98%</b>	<b>2.87%</b>	<b>5.12%</b>	<b>5.39%</b>
Oregon Tech	4.50%	6.00%	5.00%	3.91%	4.49%	4.90%	4.50%	4.00%
Western	3.98%	2.33%	4.55%	2.17%	3.19%	3.09%	5.00%	4.76%
Oregon State	3.93%	4.26%	0.00%	2.27%	9.32%	4.06%	5.07%	5.20%
OSU-Cascades	4.07%	4.40%	0.00%	2.34%	12.82%	4.06%	5.07%	5.20%
Portland State	3.95%	4.97%	4.87%	2.52%	3.63%	3.50%	4.83%	5.07%
University of Oregon	2.84%	6.91%	9.75%	4.50%	4.50%	4.00%	3.00%	3.75%

# OPU Rate Change History



# Enrollment Context: SCH Planning Variables – 1<sup>st</sup> Year & Transfer

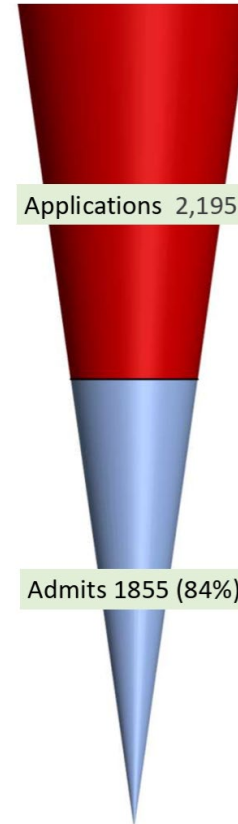
**Funnel Report: New Applicant Headcount by Student Type**  
**Fall 2025 Week Ending 3/30/25 vs. Fall 2026 Week Ending 3/29/26**  
**25 Weeks Before Start of Term**

<b>Applications</b>				
<b>Student Type</b>	<b>Fall 2025</b>	<b>Fall 2026</b>	<b>Change</b>	<b>% Change</b>
Freshmen - Resident	977	1,025	48	4.9%
Freshmen - Nonresident	775	750	-25	-3.2%
Transfer - Resident	145	161	16	11.0%
Transfer - Nonresident	132	111	-21	-15.9%
Postbacs/Grads	166	218	52	31.3%
<b>Total Apps</b>	<b>2,195</b>	<b>2,265</b>	<b>70</b>	<b>3.2%</b>

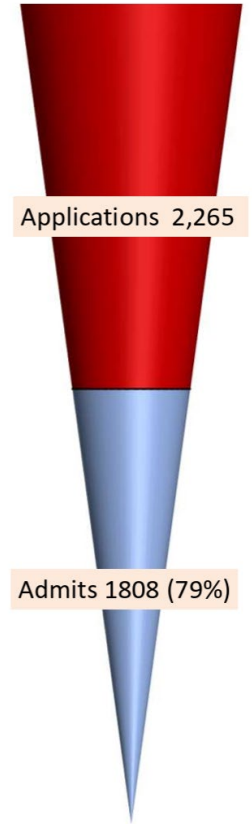
<b>Admits</b>				
<b>Student Type</b>	<b>Fall 2025</b>	<b>Fall 2026</b>	<b>Change</b>	<b>% Change</b>
Freshmen - Resident	905	911	6	0.7%
Freshmen - Nonresident	694	649	-45	-6.5%
Transfer - Resident	110	112	2	1.8%
Transfer - Nonresident	84	77	-7	-8.3%
Postbacs/Grads	62	59	-3	-4.8%
<b>Total</b>	<b>1,855</b>	<b>1,808</b>	<b>-47</b>	<b>-2.5%</b>

\*Excludes ASC/OLLI

Fall 2025 Total Apps



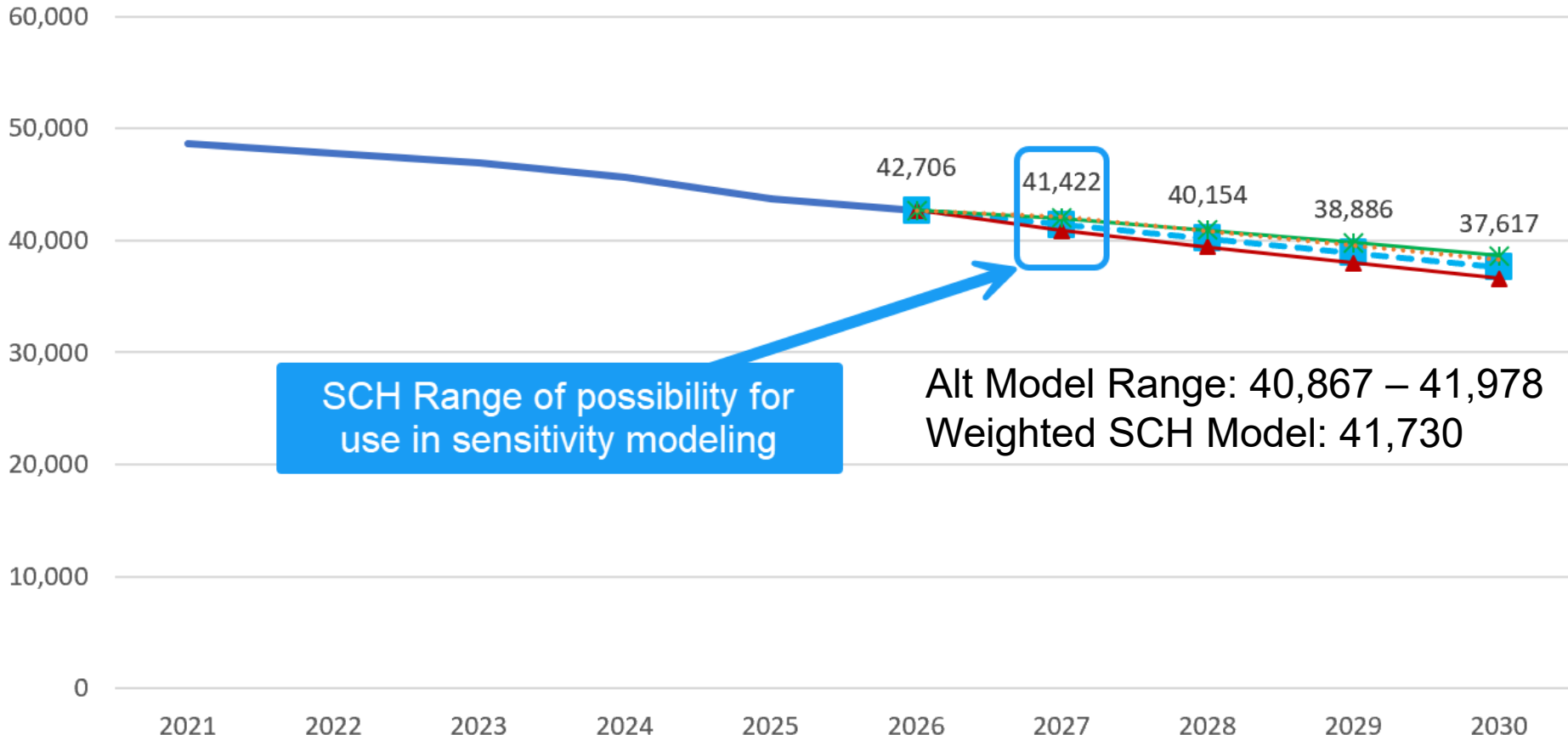
Fall 2026 Total Apps



# Fall SCH Projection: 'Alt Model'

FALL SCH ACTUALS & PROJECTIONS AY2021 - AY2030

— Values     
 - - Forecast     
 —▲ Lower Confidence Bound  
—\* Upper Confidence Bound     
 - - - - 2 per. Mov. Avg. (Forecast)

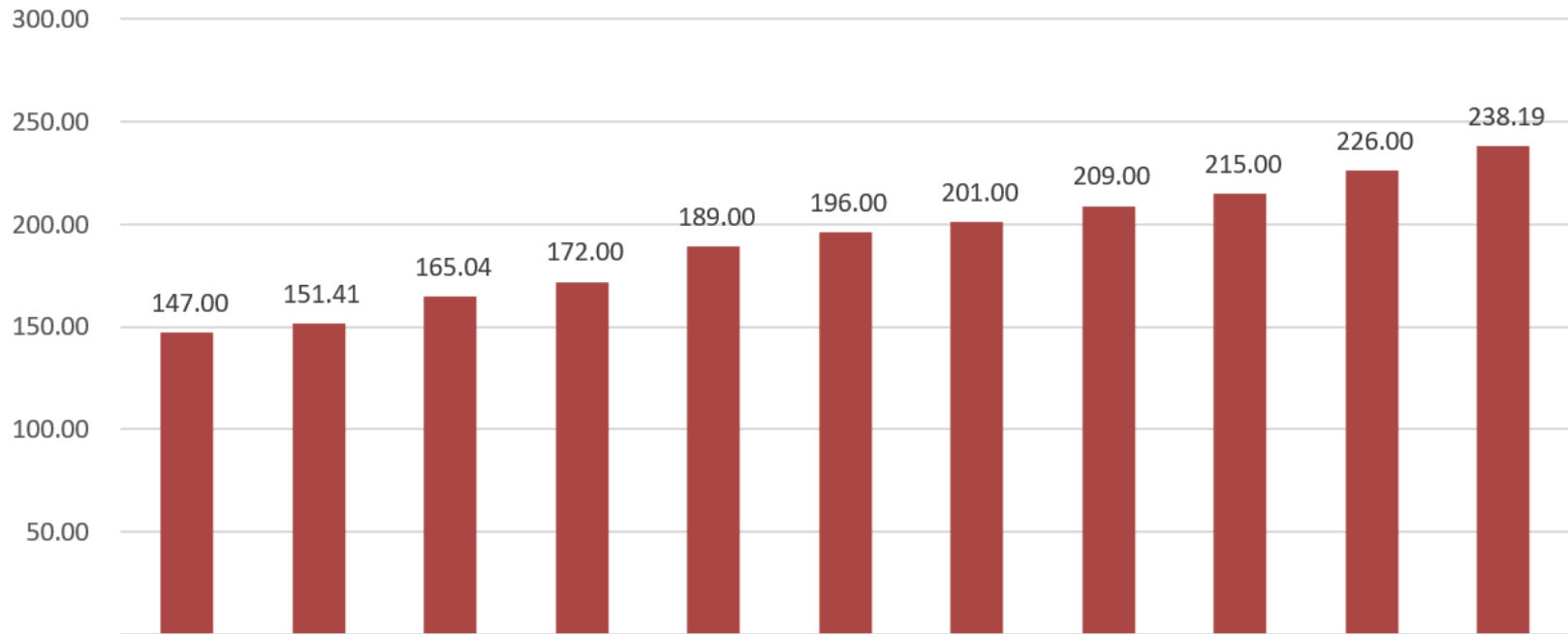


SCH Range of possibility for use in sensitivity modeling

Alt Model Range: 40,867 – 41,978  
Weighted SCH Model: 41,730

# SOU's Tuition Rate History

Resident UG Tuition Rate Academic Years 2015-16 Through 2025-26



	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
■ Resident UG Tuition Rate	147.00	151.41	165.04	172.00	189.00	196.00	201.00	209.00	215.00	226.00	238.19
% Change Since 2015-16		3.0%	12.3%	17.0%	28.6%	33.3%	36.7%	42.2%	46.3%	53.7%	62.0%

# Composite Tuition & Fees Comparison

(Three terms, 15 SCH/term, all mandatory fees)

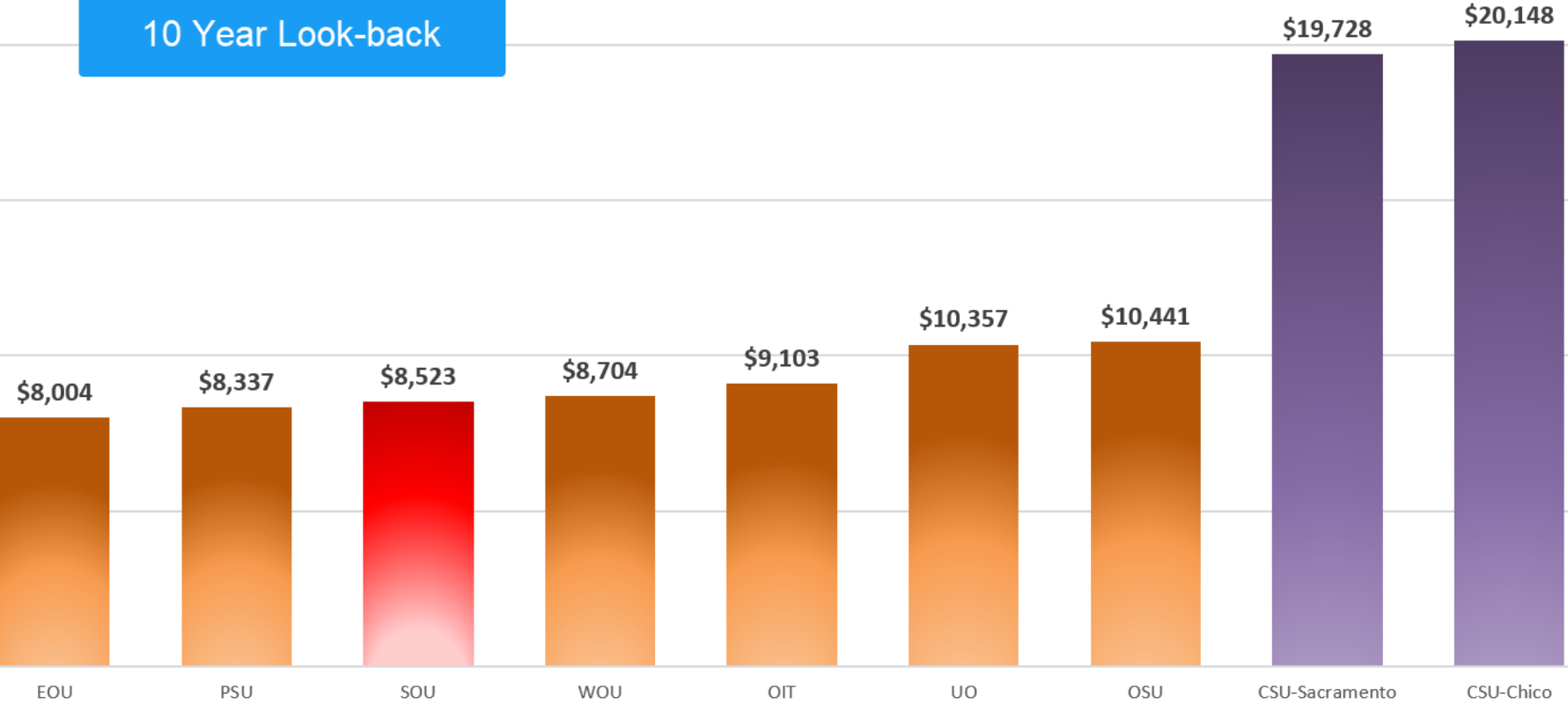


## Academic Year Tuition and Mandatory Fees

For full-time undergraduates 2016-17 Academic Year

10 Year Look-back

2016-17



# Composite Tuition & Fees Comparison

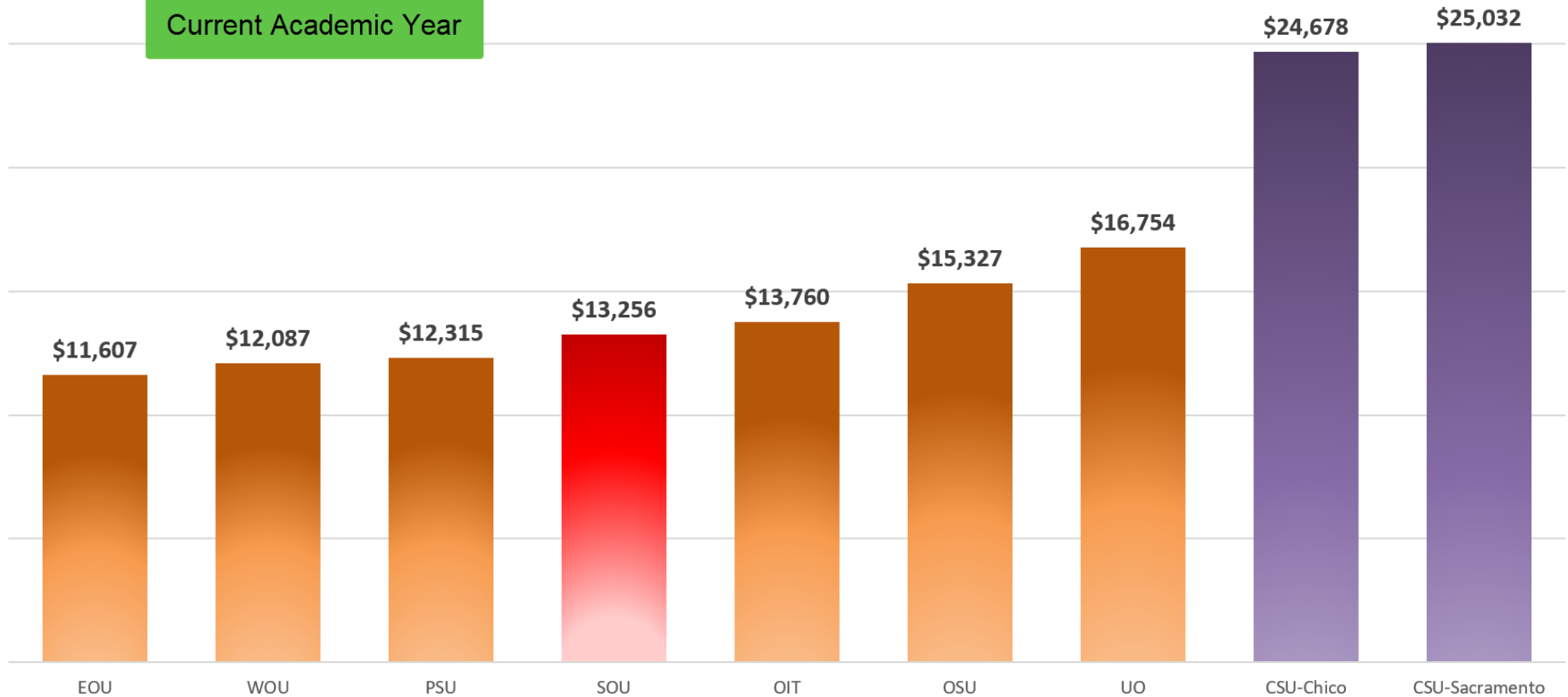
(Three terms, 15 SCH/term, all mandatory fees)



## Academic Year Tuition and Mandatory Fees

For full-time undergraduates 2025-26 Academic Year

Current Academic Year





# AY 2026-27 Tuition Recommendation

RATES BY CATEGORY	CURRENT AY	PROPOSED	Academic Year 2026-27 (FY27)				
			% Change from Prior AY	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
<b>Undergraduate Tuition Rate per SCH</b>	<b>2025-26</b>	Res: 5.37% Non-Res: 4.99%					
01-WUE SCH	\$357	\$376.00	5.32%	\$19.00	\$285.00	\$855.00	\$16,920.00
02-UG Resident SCH (incl. EXRES)	\$238.19	\$250.98	5.37%	\$12.79	\$191.85	\$575.55	\$11,294.00
02.2-UG JackJo Pledge	\$177	\$188.00	6.21%	\$11.00	\$165.00	\$495.00	\$8,460.00
03-UG Non Resident SCH	\$683	\$717	4.98%	\$34.00	\$510.00	\$1,530.00	\$32,265.00
<b>Graduate Tuition Rate per SCH</b>	Res: 4.95% Non-Res: 4.99%	Res: 4.99% Non-Res: 4.99%	% Change from Prior AY	Difference Per SCH	Difference Per Term @ 12 SCH	Difference Per AY @ 36 SCH	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$594	\$624	5.05%	\$30.00	\$360.00	\$1,080.00	\$22,464.00
06-GR Non Resident SCH	\$700	\$735	4.99%	\$34.94	\$419.32	\$1,257.96	\$26,468.00
07.0-GR AP MBA Online SCH	\$430	\$430	0.00%	\$0.00	\$0.00	\$0.00	\$15,480.00
07.3-GR AP MS.Ed Online SCH	\$369	\$400	8.40%	\$31.00	\$372.00	\$1,116.00	\$14,400.00
08-GR - MEDU SCH	\$462	\$475	2.81%	\$13.00	\$156.00	\$468.00	\$17,100.00
<b>Other Categories Tuition Rate per SCH</b>		4.99%	% Change from Prior AY	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
09-Staff	\$71	\$75	5.63%	\$4.00	\$60.00	\$180.00	\$3,375.00
10-Waived Tuition SCH	\$0	\$0	0.00%	\$0.00	\$0.00	\$0.00	\$0.00
11-Course Based Tuition SCH	\$133	\$140	5.26%	\$7.00	\$105.00	\$315.00	\$6,300.00
12-Adv Southern Credit SCH	\$59	\$62	5.08%	\$3.00	\$45.00	\$135.00	\$2,790.00
13-Early Entry Credit SCH	\$119	\$125	5.04%	\$6.00	\$90.00	\$270.00	\$5,625.00

# Revenues: Mandatory Fees



Mandatory Fees also vary:

Incidental Fees	Enrollment Fees
Student Incidental Fee (SFC)	Health Services Fee
Green Tag	Building Debt-Service Fee
Student Recreation Center (SRC)	Technology Services Fee

**\*\*\*Reminder: TAC recommends Mandatory Enrollment Fees\*\*\***

Reference: ORS 352.103, §3(c)

# Mandatory Enrollment Fees AY2026-27



- **Building Debt-Service & Technology Services Fees**

- Recommended by Administration (VPFA) to TAC and the President
- Recommended by the President to the Governing Board
- Adopted by the Governing Board – **included** in HECC review/approval

- **Health Services Fee (La Clinica)**

- Recommended by the Director, Student Health and Wellness Center to the President
- Recommended by the President to the Governing Board
- Adopted by the Governing Board – **included** in HECC review/approval

ACADEMIC YEAR (Fall, Winter, Spring terms) Rates								SUMMER RATES			
Mandatory Enrollment Fees	Current Fee Per SCH	Current Per AY (24 SCH)	Proposed Fee Per SCH	Proposed Per AY (24 SCH)	\$ ▲ Per Term	\$ ▲ per AY	% ▲	Prior Summer Rates	Proposed Summer Rates	\$ ▲ Per Term	% ▲
Health Services Fee (per SCH)	\$23.38		\$23.38		\$0.00	\$0.00	0.00%	\$17.53	\$17.53	\$0.00	
Single Fee Cap	\$187.00	\$561.00	\$187.00	\$561.00				\$140.25	\$140.25	\$0.00	0.00%
Building Debt-Service Fee (per SCH)	\$6.50		\$6.50		\$0.00	\$0.00	0.00%	\$4.88	\$4.88	\$0.00	
Single Fee Cap	\$52.00	\$156.00	\$52.00	\$156.00				\$39.00	\$39.00	\$0.00	0.00%
Technology Services Fee (per SCH)	\$4.09		\$4.09		\$0.00	\$0.00	0.00%	\$3.07	\$3.07	\$0.00	
Single Fee Cap	\$32.75	\$98.25	\$32.75	\$98.25				\$24.56	\$24.56	\$0.00	0.00%
Composite <b>Enrollment</b> Fees:	\$33.97	\$815.25	\$33.97	\$815.25	\$0.00	\$0.00	<b>0.00%</b>	\$25.48	\$25.48	\$0.00	<b>0.00%</b>

Reference: ORS 352.102

# Mandatory Enrollment Fees



## [HB 2542: Display of Mandatory Fees](#)

**Summary:** Requires each public university and community college to prominently display mandatory fees charged. Each institution shall report to the HECC no later than September 1 of each year a description of efforts to display mandatory fees, description of **use of mandatory fee, and financial overview**. First applies to 2021-2022 academic year.

**Effective Date:** January 1, 2022

## **ORS 350.205** [ORS 350.205](#)

### Display of mandatory enrollment fees

- (1) As used in this section, "mandatory fee" means a fee of general applicability to students, whether full-time or part-time, that is required prior to matriculation or taking courses, including a fee proposed by a recognized student government.
- (2) Each public university listed in [ORS 352.002 \(Public universities\)](#) or community college shall prominently display, as provided in subsection (3) of this section, a description of every mandatory fee charged by the public university or community college.

# Mandatory Enrollment Fees



**The following three slides, taken from the SOU tuition and fee website, are for read ahead ‘information only’ purposes and will not be discussed during the meeting.**

# Mandatory Enrollment Fee Components



## Health Services Fees: \$187.00

The Health Services Fee is a mandatory enrollment fee that supports all of the services offered by the Student Health and Wellness Center (SHWC) both in-person and remote.

The Tuition Advisory Council, in consultation with the service provider La Clinica, is responsible for recommending the amount and allocation of the Health Services fee to the President who brings the recommendation before the Board of Trustees for adoption.

### Admin Recommendation:

- Maintain \$187 per contract agreement
- More data provided to La Clinica about fee eligible populations forthcoming



**LA CLINICA**  
AFFORDABLE HEALTH CARE EXCELLENCE FOR ALL

# Mandatory Enrollment Fee Components



## Building Debt-service Fee: \$52.00

This mandatory *enrollment* fee is collected to pay debt-service associated with past construction and renovation projects on the SOU campus. Any additional funds collected are put into a reserve or used for small construction projects.

The Tuition Advisory Council is responsible for recommending the amount and allocation of the Building fee to the President who brings the recommendation before the Board of Trustees for adoption.

Enrollment decline means fewer dollars supporting the reserve

- Debt service piece will struggle to satisfy required payments by 2030

Admin Recommendation:

- Maintain this Single Fee component at **\$52** for AY 2026-27
- Likely to change for AY 2027-28 after Workday Student Implementation

# Mandatory Enrollment Fee Components



## Technology Services Fee: \$32.75

This mandatory *enrollment* fee is collected and used to support campus IT hardware, software and subscriptions specific to instruction and course-delivery. The fee also generates a reserve that is used to mitigate financial burdens stemming from periodic large IT projects like network upgrades.

The Tuition Advisory Council is responsible for recommending the amount and allocation of the Technology Services fee to the President who brings the recommendation before the Board of Trustees for adoption.

### Admin Recommendation:

- Maintain this Single Fee component at **\$32.75** for AY 2026-27
- Likely to change for AY 2027-28 after Workday Student Implementation

# Matriculation Fee

## One-time Matriculation Fee *Excluded* from the Mandatory Student Fee

Academic Year 2024-25: \$350.00

Academic Year 2025-26: \$375.00

### Admin Recommendation

Academic Year 2026-27:

- MAINTAIN at \$375

The Matriculation Fee is a one-time mandatory enrollment fee of \$350, assessed to all new and incoming transfer students. The fee is designed to reduce (but not eliminate) other administrative student fees (e.g orientation, scheduling, transcribing, degree applications, re-enrollment). It also supports first-year student interest groups and campus engagements.

The Tuition Advisory Council is responsible for recommending the amount and allocation of the Matriculation fee to the President who brings the recommendation to the Board for consideration and approval.

# The Mandatory Student Fee “Single Enrollment Fee”

From the [Tuition and Fee](#) website:

Southern Oregon University (SOU) remains committed to providing high-quality, accessible, and affordable education. In June 2024, the Board of Trustees approved a new Mandatory Student Fee structure ([see here](#)), starting with the 2024-25 academic year. Students will now be charged a single mandatory fee of \$104.22 per credit hour for all SOU-based courses, whether taken face-to-face or online, with the fee plateauing at the 8th credit hour.

This change eliminates the previous \$75 per credit hour Online Delivery Fee, resulting in a more transparent and simplified billing process, and removes issues associated with students taking courses in multiple modalities in the same term. This new approach also makes low-credit courses more affordable and accessible, particularly benefiting working professionals and non-traditional students.

# The Mandatory Student Fee

## “The Single Fee”

### A BRIEF HISTORY LESSON...

1. AY 2023-24 and earlier, fees were assessed on a ‘headcount’ type basis
2. If a student was taking online courses, fees were not in alignment with their face-2-face costs and this created inequities
3. Individual fees assessed on student accounts/bills were challenging for students to understand and time-consuming to explain
4. Starting in AY 2024-25, a ‘Single Student Fee’ was established and assessed per SCH up to a cap of 8 SCH per term
5. Now in AY 2025-26 (current academic year); we are in year two of administering the current fee structure

# Single Fee - Eligibility

## Not Every Student Pays the Single Fee

- RisePoint Programs (MBA, MS.Ed)
- Community Programs (OLLI, ASC)
- Staff (but dependents DO pay)
- Course-based (Summer Language Institute, etc)
- Exchange students on 'Home Pay' plans
- Waivers per statutes (Federal / State)

# How are we doing? Goals from April 2024



## Goals Achieved

- ✓ Fix fee-related challenges associated with students simultaneously registered for in-person and online courses
- ✓ Make low-credit thresholds more affordable
- ✓ Increase access to non-traditional students
- ✓ Improve transparency and simplify billing
- ✓ Prepare for Workday Student
- ✓ Maintain solvency for fee supported areas
- ✓ Stabilize [planning] for mandatory fee revenue
- ✓ Provide for greater flexibility

## Goals In Progress

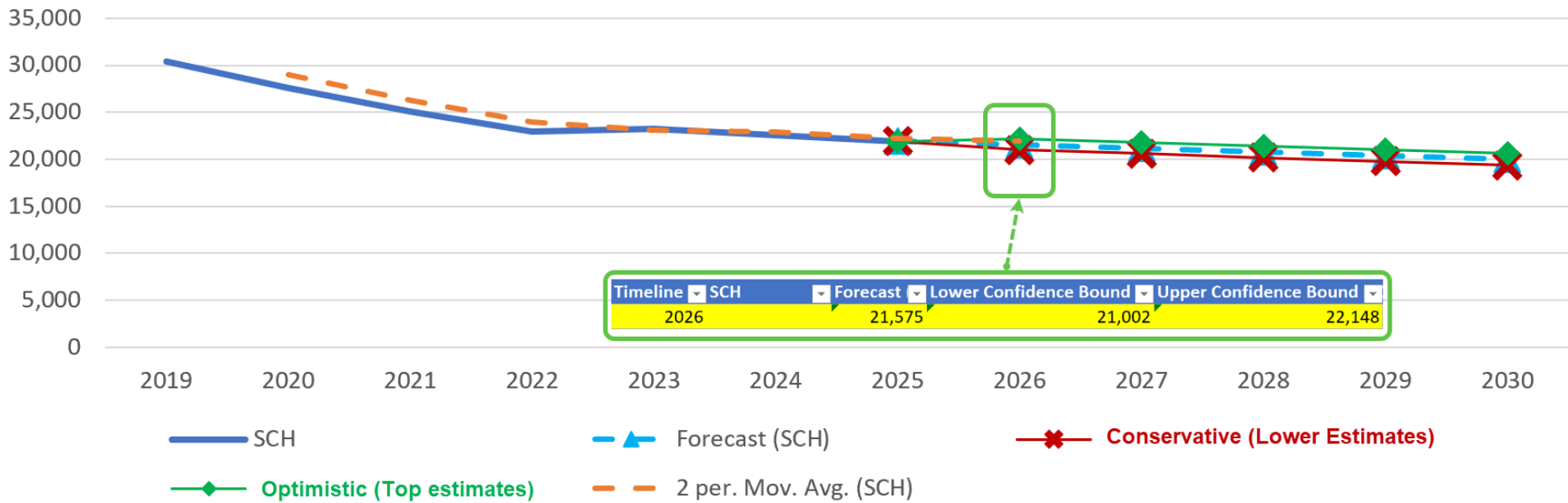
- ❖ Maintain at-least current revenue levels

# Fee-Eligible Fall SCH Projection

(As of 2/24/2026 and subject to change after Budget Note implementation)



### Fall Term - Single Fee Payer SCH | History & Forecast



- Stabilization through fee-eligibility across a larger segment of SCH
- Modeling based on actual student behavior across rate eligible SCH and
- Greater predictive analytics for more predictable planning and revenue estimates

# Housing & Dining Rates Update

*~For informational purposes only*



# Housing & Dining Rate Updates

*- For informational purposes only*



Housing	Current per term	Curr/AY	New Rate	New/AY	Inc \$/Term	Inc \$/AY	Inc %
Greensprings/Cox - Double	\$3,176	\$9,528	\$3,271	\$9,814	\$95	\$286	3.00%
Greensprings/Cox - Double-as-Single	\$4,195	\$12,585	\$4,321	\$12,963	\$126	\$378	3.00%
Madrone - Single Apartment	\$4,901	\$14,703	\$5,048	\$15,144	\$147	\$441	3.00%
Shasta - Double	\$3,587	\$10,761	\$3,695	\$11,084	\$108	\$323	3.00%
Shasta - Single	\$4,368	\$13,104	\$4,499	\$13,497	\$131	\$393	3.00%
McLoughlin - Double	\$3,778	\$11,334	\$3,891	\$11,674	\$113	\$340	3.00%
McLoughlin - Single	\$4,690	\$14,070	\$4,831	\$14,492	\$141	\$422	3.00%
McLoughlin - Super Single	\$5,159	\$15,477	\$5,314	\$15,941	\$155	\$464	3.00%
McLoughlin - Studio Single	\$5,263	\$15,789	\$5,421	\$16,263	\$158	\$474	3.00%

Meal Plans	Current per term	Curr/AY	New Rate	New/AY	Inc \$/Term	Inc \$/AY	Inc %
Red Plan (19 meals per week)	\$2,271	\$6,814	\$2,351	\$7,053	\$79	\$238	3.50%
SOU Plan (14 meals per week)	\$1,920	\$5,760	\$1,987	\$5,961	\$67	\$202	3.50%
Rocky Plan	\$1,514	\$4,543	\$1,567	\$4,702	\$53	\$159	3.50%
Hawk Plan	\$1,060	\$3,180	\$1,097	\$3,291	\$37	\$111	3.50%
Madrone Plan	\$973	\$2,920	\$1,000	\$3,000	\$27	\$80	2.73%

\*All figures rounded to nearest whole dollar

# Proposed Resident Undergraduate Cost of Attendance for AY 2026-27



Tuition	Current per Term	Current Per AY	Proposed per Term @15 SCH	Proposed Per AY	\$ ▲ Per Term / Per Credit	\$ ▲ per AY	% ▲
Resident Undergrad	\$3,572.85	\$10,718.55	<b>\$3,764.70</b>	\$11,294.10	\$12.79	\$575.55	5.37%
<b>Mandatory Enrollment &amp; Incidental Fees</b>							
Student Incidental & Green Tag Fees	\$470.00	\$1,410.00	<b>\$490.00</b>	\$1,470.00	\$20.00	\$60.00	4.26%
Student Rec Center Fee	\$118.00	\$354.00	<b>\$130.00</b>	\$390.00	\$12.00	\$36.00	10.17%
Health Services Fee	\$187.00	\$561.00	<b>\$187.00</b>	\$561.00	\$0.00	\$0.00	0.00%
Building Debt-Service Fee	\$52.00	\$156.00	<b>\$52.00</b>	\$156.00	\$0.00	\$0.00	0.00%
Technology Services Fee	\$32.75	\$98.25	<b>\$32.75</b>	\$98.25	\$0.00	\$0.00	0.00%
Composite Fees:	\$859.75	\$2,579.25	<b>\$891.75</b>	\$2,675.25	\$32.00	\$96.00	3.72%
Composite Tuition and All Fees:	\$4,432.60	\$13,297.80	<b>\$4,656.45</b>	\$13,969.35	\$44.79	\$671.55	<b>5.05%</b>

HECC - Tuition & Mandatory Enrollment Fees:	\$3,844.60	\$11,533.80	\$4,036.45	\$12,109.35	Academic Year % Change:	<b>4.99%</b>
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Housing/Meals	Current per term	Curr/AY	New Rate	New/AY	Chg \$/Term	Chg \$/AY	% Chg
Shasta Double	\$3,587	\$10,761	<b>\$3,695</b>	<b>\$11,084</b>	\$108	\$323	3.00%
Red Plan	\$2,271	\$6,814	<b>\$2,351</b>	<b>\$7,053</b>	\$79	\$238	3.50%
Composite Housing/Meals Change:	\$5,858	\$17,575	<b>\$6,045</b>	<b>\$18,136</b>	\$187	\$561	3.19%

Composite Cost of Attendance*	Current per term	Curr/AY	New/Term	New/AY	Chg \$/Term	Chg \$/AY	% Chg
Resident Undergrad	\$10,290.96	\$30,872.88	<b>\$10,701.92</b>	<b>\$32,105.75</b>	\$231.90	\$1,232.87	<b>3.99%</b>

Note: Housing & Dining figures rounded to nearest whole dollar

\*Excludes course fees, books, and other special fees or charges required for specific enrollment situations.

# Tuition Differential Update

Differential tuition is defined as “additional tuition that is supplementary to the base tuition level” approved annually by the SOU Board of Trustees

Differential tuition is intended to:

1. offset higher than average instructional costs; or
2. provide supplemental resources to enhance program quality; or
3. reflect the market for programs with high demand.

Differential Rate Type	Current Rate	AY2026-27 Rate
Fine and Performing Arts	<b>\$10/SCH</b>	<b>\$15/SCH</b>
Honors*	<b>\$25/SCH</b>	<b>\$25/SCH</b>

Former undergraduate differential rate no longer in effect:

- Military Science

\*The Honors differential is only applied to teaching out honors courses until Honors College closure. New honors program rate(s) to be determined prior to the start of AY2027.

# Accreditation Update

# Accreditation FAQs

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

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

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

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

<p><b>Where are we currently in the seven-year cycle?</b></p>	<p>We are currently in our <b>second year</b> of the seven-year cycle, following our last full accreditation site visit (the Year 7 Evaluation of Institutional Effectiveness).</p>
<p><b>What is our next major accreditation milestone?</b></p>	<p>Our next major event is the <b>Mid-Cycle Evaluation Report and Site Visit Fall 2026 (Year 3)</b>.</p>
<p><b>What is the focus of the Mid-Cycle Review?</b></p>	<p>The Mid-Cycle Review is a formative, collaborative evaluation. The peer review team will focus on: * Our progress in fulfilling our institutional mission and core themes. * Evidence of student achievement and continuous improvement in all areas. * Our readiness for the Year 7 comprehensive review.</p>
<p><b>What is the Board's role in this process?</b></p>	<p>The Board of Trustees plays a vital role in demonstrating <b>Standard Two compliance</b> (Governance, Resources, and Capacity). Specifically, the Board is responsible for: * Ensuring the long-term <b>financial stability</b> and <b>sustainability</b> of the institution. * Upholding <b>institutional integrity</b> and <b>academic freedom</b>. * Approving the mission and core themes, and monitoring the overall <b>effectiveness</b> of the university leadership and operations.</p>

# Accreditation Timeline

- Ad-Hoc report submitted 9-1-25
- Feedback from NWCCU received February 25, 2026
- NWCCU Request for Response (RFR) letter received February 18, 2026
- SOU response to RFR submitted on March 18, 2026
- NWCCU response expected by April 18, 2026
- Mid-Cycle Evaluation Report due 9-1-26
- Mid-Cycle Site Visit October 2026



February 25, 2026

Dr. Richard Bailey  
President  
Southern Oregon University  
1250 Siskiyou Boulevard  
Ashland, OR 97520

Dear President Bailey:

This letter serves as formal notification and official record of action taken by the Northwest Commission on Colleges and Universities (NWCCU) at its meeting on January 27-30, 2026, concerning the Fall 2025 Ad Hoc Report of Southern Oregon University.

### **Accreditation**

Accept the Report

### **Status of Previous Recommendations Addressed in this Evaluation**

- Recommendation 3: Fall 2023 Evaluation of Institutional Effectiveness - Fulfilled
- Recommendation 4: Fall 2023 Evaluation of Institutional Effectiveness - Continued as Non-Compliant
- Recommendation 6: Fall 2023 Evaluation of Institutional Effectiveness - Fulfilled
- Recommendation 7: Fall 2023 Evaluation of Institutional Effectiveness - Fulfilled

### **Recommendations Out of Compliance**

The Commission finds that the following Recommendations are areas where Southern Oregon University is out of compliance with the NWCCU Standards for Accreditation. According to U.S. Department of Education Regulation 34 CFR 602.20 and Commission Policy, the Commission requires that Southern Oregon University take appropriate action to ensure these Recommendations are addressed and resolved within the prescribed four-year period, no later than March 1, 2028.

The Commission recommends that Southern Oregon University:

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

### **Future Evaluations**

- Mid-Cycle Review Fall 2026
  - Recommendation 4: Fall 2023 Evaluation of Institutional Effectiveness
  - Recommendation 5: Fall 2023 Evaluation of Institutional Effectiveness
- Ad Hoc Report with Visit Fall 2028
  - Recommendation 1: Fall 2023 Evaluation of Institutional Effectiveness
  - Recommendation 2: Fall 2023 Evaluation of Institutional Effectiveness
- Year 6 - Standard 2 - Policies, Regulations, and Financial Review Fall 2029
- Year 7 - Evaluation of Institutional Effectiveness Fall 2030

NWCCU is committed to an accreditation process that adds value to institutions while contributing to public accountability, and we thank you for your continued support of this process. If you have questions about any of the information in this letter, please contact your staff liaison, Dr. Gita Bangera, at [gbangera@nwccu.org](mailto:gbangera@nwccu.org).

Sincerely,



Dr. Selena M. Grace  
President

cc: Dr. Dan DeNeui, Associate Provost  
Ms. Sheila Clough, Chair, Board of Trustees  
Mr. Ben Cannon, Executive Director, Oregon Higher Education Coordinating Commission

# Ad Hoc Report without a Visit Staff Review

**Institution:** Southern Oregon University

**Review Season/Year:** Fall 2025

**Report type:** Ad Hoc Report

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

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

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

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

*Source: SOU-2023-Evaluation of Institutional Effectiveness | Evaluated at: SOU-Fall 2025-Ad Hoc Report*

## Recommendation Feedback from the Review

### **Recommendation 3: Fall 2023 Evaluation of Institutional Effectiveness**

#### **Components of the Recommendation in which the institution has demonstrated progress:**

This recommendation is focused on both establishment of peer institutions list and disaggregation of the data. The institution has conducted a thorough institution-wide analysis to identify a single list of peer comparators. The report demonstrates that the institution now has a minimal amount of data on its external website comparing its retention and graduation rates against clearly identified peers.

#### **Components of the Recommendation in which the institution has not demonstrated or clearly documented significant progress:**

The institution has not shared disaggregated data publicly.

#### **Suggestions for the institution on the Recommendation:**

The institution should continue to focus on disaggregation of data, as appropriate.

### **Recommendation 4: Fall 2023 Evaluation of Institutional Effectiveness**

#### **Components of the Recommendation in which the institution has demonstrated progress:**

Progress on this recommendation was dependent on completing work on Recommendation 3. The institution notes that it is in the planning stages on work related to this recommendation.

**Components of the Recommendation in which the institution has not demonstrated or clearly documented significant progress:**

The institution has yet to identify a robust set of benchmarks and demonstrate how it is using benchmarked student data to inform the creation of student achievement goals.

**Suggestions for the institution on the Recommendation:**

The institution needs to fully develop and implement their plans for developing benchmarks and use the benchmarked data to inform student achievement measures and resource allocation.

**Recommendation 6: Fall 2023 Evaluation of Institutional Effectiveness**

**Components of the Recommendation in which the institution has demonstrated progress:**

The institution has published student learning outcomes for its programs.

**Components of the Recommendation in which the institution has not demonstrated or clearly documented significant progress:**

While the institution has published student learning outcomes, it is not clear that these outcomes are reviewed regularly. In several instances, the student learning outcomes appear to be identical for different programs (e.g., BA/BS/BFA in Art all have the same student learning outcomes).

**Suggestions for the institution on the Recommendation:**

The institution should examine and update its student learning outcomes.

**Recommendation 7: Fall 2023 Evaluation of Institutional Effectiveness**

**Components of the Recommendation in which the institution has demonstrated progress:**

The report demonstrates that the institution has established a checklist for distance education courses, and that it has added training and support mechanisms for faculty who teach online.

**Components of the Recommendation in which the institution has not demonstrated or clearly documented significant progress:**

None.

**Suggestions for the institution on the Recommendation:**

None.

## Report Quality

### Strengths of the report:

The report was thorough and included the necessary documentation to assess progress on the recommendations.

### Areas for improvement in future reports:

N/A



February 18, 2026

Dr. Richard Bailey Jr.  
President  
Southern Oregon University  
1250 Siskiyou Boulevard  
Ashland, Oregon 97520

Dear President Bailey:

The Northwest Commission on Colleges and Universities (NWCCU) has reviewed information provided by Southern Oregon University (SOU) and the Higher Education Coordinating Commission, as well as media coverage in [Ashland News](#) regarding the cash flow shortage that SOU faces.

We have evaluated the information pursuant to NWCCU's [Receipt of Unsolicited Information Policy](#). The information provided raises concerns regarding SOU's compliance with NWCCU Eligibility Requirements (ERs) and Standards, specifically ERs 19 and 23 and Standards 2.D.1, 2.E.1, 2.E.2, 2.G.1.

Per NWCCU [policy](#) we request a response to the questions below within 30 days of this notification. However, given the urgency of the situation, we request that you submit your response as soon as possible.

Within 30 days of the institutional response, our senior staff and I will review the materials and make a preliminary determination. If the institution is determined to be in compliance with the applicable Standards, the matter will be considered closed, and the institution will be notified of the decision. If it is determined that additional follow-up is needed, including a visit, the institution will be so informed. If it is determined the institution may be non-compliant, the matter will be referred to the NWCCU Board of Commissioners for action.

1. What is the current financial position and cash flow risk? What factors contributed to the current financial position? (Standards 2.E.1, 2.E.2; ER 19)
2. How has the Board of Trustees been kept apprised of financial challenges of the institution, including the ability to support instructional and student support operations, debt service, contractual obligations, and administrative operations? Please provide a timeline of reporting to the Board over the last 12 months. When was the Board of Trustees informed of the current situation and what actions the Board has taken to exercise fiduciary oversight? How does the institution/Board plan to adhere to [SOU Policy FAD.048 Budgeted Operations Fund Balances](#)? (Standards 2.E.1, 2.E.2; ER 19)
3. What resources are necessary for the institution to meet its financial obligations through the remainder of the academic year? What are the plans for securing these resources? (Standards 2.E.1, 2.E.2; ER 19)



4. How will the institution ensure continued delivery of instruction and student support through the end of the academic year? (Standards 2.G.1; ER 23)
5. What is the institution's plan for timely, accurate, and transparent communication with students regarding financial risks? (Standards 2.D.1)
6. What plans are in place in the event the institution does not have the financial resources to meet its obligations for the remainder of the academic year? (Standards 2.E.1, 2.E.2; ER 19)

In addressing these questions, please include the specific plans and financial documents being shared with the SOU Board of Trustees.

Should you have any questions, please contact your NWCCU staff liaison, Dr. Gita Bangera.

Sincerely,

Selena M. Grace PhD  
President

cc: Daniel Deneui, Associate Provost, Southern Oregon University  
Gita Bangera, Senior Vice President, NWCCU  
Sheila Clough, Chair, Board of Trustees, Southern Oregon University



OFFICE OF THE PRESIDENT

March 18, 2026

**Via Email**

Northwest Commission on Colleges and Universities  
8060 165<sup>th</sup> Ave NE, Suite 200  
Redmond, WA 98052

Re: **Response to February 18, 2026 Inquiry**

To Whom It May Concern:

On behalf of Southern Oregon University (SOU), we appreciate the opportunity to respond to the Northwest Commission on Colleges and Universities' (NWCCU) inquiry dated February 18, 2026. SOU remains committed to the NWCCU Eligibility Requirements and Standards, particularly those regarding financial stability and student success. While the university announced an impending cash flow issue in February 2026, we have taken proactive steps to secure our financial position and ensure the continued delivery of our educational mission. One of the key steps in that process was securing an allocation of up to \$15 million dollars in state funding through the Oregon Legislature. As part of that allocation, we are working with an external consultant to develop a long-term sustainability plan.

The following responses detail our current fiscal standing, the structural factors that led to this situation, and our ongoing efforts to secure long-term sustainability developed in collaboration with our external consultant, Board of Trustees, and state leadership. We are confident that, with recent legislative support and internal oversight, SOU will continue to meet all financial and instructional obligations to our students and the broader community.

1. What is the current financial position and cash flow risk? What factors contributed to the current financial position? ([Standards 2.E.1, 2.E.2; ER 19](#))

While Southern Oregon University's current financial position and cash flow are stable through the end of the 2025-2026 academic year, in January of this year, we became aware of a cash flow risk that we knew needed immediate attention. Internal measures to address cash flow were taken, including: a university-wide hiring freeze; travel restrictions; and new spending procedures and limits. In addition to these measures, we successfully sent a team of representatives to the state capitol, and the Oregon legislature allocated up to \$15 million dollars through [House Bill 5024](#) (Section 109) in funding for SOU specifically.

SOU's current financial position is the result of several converging factors over the last decade: chronic state underfunding, declining enrollment and course-taking behavior, and significant cost escalations (mandated insurance and retirement plan costs, utilities, collective bargaining agreements, and supplies inflation). The concurrent impacts of regional wildfires and the COVID-19 pandemic precipitated enrollment declines, necessitating a reliance on one-time funding to bridge the resulting budgetary

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gaps. However, those same bridge funding events overshadowed the underlying structural issues that brought us to our current financial position. These challenges were further compounded by recent transitions in financial leadership within the past four years and the implementation of a new Workday Enterprise Resource Planning system. In February 2026, Southern Oregon University announced an impending cash flow issue. While the Board has received regular updates on fund balance and cash targets (see the detailed description in our answer to question 2 below), we have now implemented detailed [cash flow projections](#) (pg. 7-20), which we provide to the Board of Trustees and/or its Finance and Administration Committee. This detailed cash flow forecast was presented to the Finance and Administration Committee on February 2, 2026. Since that time and due to the mitigation efforts noted above, SOU's cash flow forecast has improved.

2. How has the Board of Trustees been kept apprised of the financial challenges of the institution, including the ability to support instructional and student support operations, debt service, contractual obligations, and administrative operations? Please provide a timeline of reporting to the Board over the last 12 months. When was the Board of Trustees informed of the current situation and what actions the Board has taken to exercise fiduciary oversight? How does the institution/Board plan to adhere to SOU Policy FAD.048 Budgeted Operations Fund Balances? ([Standards 2.E.1, 2.E.2; ER 19](#))

The Board of Trustees (Board) has three standing committees: Academic and Student Affairs; Finance and Administration; and Executive, Audit, and Governance. The Board and its standing committees meet at least once per quarter during the academic year in October, January, April, and June, with a retreat of the Board in September (2025-2026 schedule available [here](#)). During Board meetings—and especially with the Finance and Administration Committee, which meets additionally in March and May—trustees are kept apprised of and discuss the current and projected financial condition of the university, including the ability to support instructional and student support operations, debt service, contractual obligations, and administrative operations. The Finance and Administration Committee of the Board conducts “deep-dive” analyses of the university’s then-current and projected financial condition, including challenges.

The Board also holds special meetings outside of its regular schedule to address emergent issues. In the last 12 months, the Board held an additional six special meetings (in 2025: March, July, August, September; in 2026: February, March). Each of these special meetings was called to discuss or take action on items related to the university’s general financial challenges, as well as its ability to support instructional and student support operations, debt service, contractual obligations, and administrative operations.

The Finance and Administration Committee of the Board typically discusses the pro forma budget, with comparisons to prior years and projections for future years, adjustments, and variances in the context of university operations including instruction, student affairs, information technology, debt service, contractual obligations, and labor, as well as macro issues affecting higher education nationally, statewide, and specifically SOU. Trustees also receive a financial dashboard, and a periodic management report that compares actual spending to budgeted operations and cash targets. On January 16-17, 2026, the Board discussed the university's serious financial condition as [presented in the budget](#) (pg. 17-30). Upon request for more information, the Board met on [February 2, 2026](#), and was officially informed of the acute, current situation when cash flow projections were presented to the Board.

In June 2025, the Board took a definitive fiduciary step by rejecting a proposed FY 2026 deficit budget.

Instead, the Board directed the University President and Administration to identify at least \$5 million in budget adjustments to achieve a balanced Education & General (E&G) budget by the end of the 2025-2026 fiscal year. The Board also asked for alternative proposals if the Administration determined that \$5 million would be insufficient to address the structural fiscal challenges. This action led to the board's approval of the [SOU Resiliency Plan](#) in September 2025. These multi-year reductions of \$8.7 million in labor as well as supplies and services, along with over \$2 million of additional savings in remissions dollars, are projected to result in more than \$10 million in savings over the next four years, projected to \$4.6M and currently estimated to be \$4.3M of which is expected to be achieved by June 30, 2026. The Board previously exercised its authority under state statute to authorize the sale of excess real property to generate income, albeit non-recurring. In January 2026, after the proceeds of the excess real property sales materialized, the Board specifically directed that these proceeds be deposited into a strategic university reserve fund titled "University Reserve - BOT Approval Required." The Board directed that "all net proceeds from the board-authorized sales of excess university properties be restricted in order to bolster the university's financial reserves and/or pursue revenue-generating opportunities." Any use of these proceeds must be approved by the Board for essential and exceptional projects that demonstrate a clear, measurable financial return on investment at least equal to the amount of funding requested, while also presenting a clear value hypothesis for generating new, sustainable revenue for the university. Additionally, any funding approved by the Board for strategic uses must be repaid to the reserve." In these ways, the Board has worked to exercise fiduciary oversight over the university.

Regarding the university, SOU Policy FAD.048 Budgeted Operations Fund Balances targets an ending E&G fund balance of 10% of annual budgeted operating revenues, reporting to the Board with explanations of variances, although maintaining this fund balance has not been achievable. Management provides regular financial reports and forecasts at each meeting of the Finance and Administration Committee and to the entire Board. These reports include SOU's actual and projected fund balance, along with a discussion about variances, as described above (five paragraphs earlier). From these discussions, the Board has recommended and supported two budget realignment initiatives, the previously referenced *SOU Forward* plan (2023) and the *SOU Resiliency* plan (2025). SOU is committed to maintaining this practice and recently has implemented others, such as providing regular cash flow reports, to ensure the Board remains fully informed and consistently updated on SOU's financial condition.

3. What resources are necessary for the institution to meet its financial obligations through the remainder of the academic year? What are the plans for securing these resources? ([Standards 2.E.1, 2.E.2; ER 19](#))

SOU can currently meet its financial obligations through the remainder of the 2025-2026 academic year. On March 6, 2026, the Oregon legislature passed the attached House Bill 5204, which is awaiting the Governor's signature. In section 320(1) of the Bill, up to \$15 million dollars is allocated to SOU as a Special Purpose Appropriation (SPA). SOU expects a signature on the legislation per the attached letter from the Governor dated February 26, 2026. As mentioned previously, SOU is collaborating with Oregon's Higher Education Coordinating Commission (HECC) to submit a report to the HECC by April 30, 2026, that details the actions the university will take to ensure continued operations through June 30, 2027, including updated financial modeling, endorsed by external budget and accounting experts, demonstrating the institution's ability to meet all obligations through June 30, 2027, as well as an additional report on how it will achieve fiscal sustainability for the 2027-2029 biennium and beyond. To produce this long-term sustainability report, the HECC has secured the services of Deloitte, a global

consulting firm with significant experience in higher education. This report will be submitted to the State of Oregon's Emergency Board (E-Board), as required, to obtain this funding on June 17, 2026. Staffed by Oregon's Legislative Fiscal Office, the state's E-Board operates during the interim when the Legislature is not in session to consider agency requests and allocate funding. SOU anticipates that this funding will sufficiently mitigate its current financial situation, effectively resolving the issue through the coming 2026-2027 academic year. SOU will promptly notify NWCCU when HB 5204 is signed into law.

4. How will the institution ensure continued delivery of instruction and student support through the end of the academic year? ([Standards 2.G.1; ER 23](#))

There will be no disruption to the delivery of our academic plan or to our student support in the 25-26 academic year, as we've explained in question 3 and per Standards 2.G.1; ER23. With the receipt of the state funding, SOU remains confident in its ability to maintain seamless academic operations and comprehensive student programming for the duration of the academic year. Despite the financial challenges, there will be no disruption to academic instruction or student support.

5. What is the institution's plan for timely, accurate, and transparent communication with students regarding financial risks? (Standards 2.D.1)

SOU maintains direct engagement with the student government (Associated Students of Southern Oregon University-ASSOU) to ensure clear communication. To support broader transparency and timely updates, the Institution has used and will continue to use campus-wide emails, Campus Conversations, and town hall forums to facilitate ongoing student dialogue. Below is a list of communications that have already gone out to students, including those that were targeted specifically to students.

- February 3, 2026-all campus email from President Bailey
- February 5, 2026-all campus email from President Bailey
- February 6, 2026-all campus email from President Bailey
- February 6, 2026-in-Person (and virtual) Campus Conversation led by President Bailey
- February 10, 2026-all campus email from President Bailey
- February 13, 2026-all campus email from President Bailey
- February 25, 2026-Associated Students Southern Oregon University (ASSOU) student town hall with President Bailey, Provost Shillam, and Vice President Howell.
- February 26, 2026-all campus email from President Bailey
- March 6, 2026-all campus email from President Bailey
- March 13, 2026-all campus email from President Bailey

We will continue to keep students abreast of any new developments through our established communication channels as outlined above. As the plan with Deloitte takes shape between now and April 30, 2026, the university has implemented a shared governance project team (to include student government leaders), focus groups (including one specifically reserved for students), and an 'always on' feedback mechanism to allow for comments, suggestions, recommendations and ideas to the Project Team and the Consulting Group. In addition, the president has started providing weekly update memos to all internal campus stakeholders (students, faculty and staff) and the Board of Trustees, to keep everyone notified of progress and next steps.

6. What plans are in place in the event the institution does not have the financial resources to meet its obligations for the remainder of the academic year? (Standards 2.E.1, 2.E.2; ER 19)

SOU does not anticipate any disruption in meeting its fiscal obligations through the conclusion of the 2025-2026 academic year. With the allocation of state funds, SOU will remain solvent through the 2026-2027 academic year as well.

Very Respectfully,

A handwritten signature in black ink, appearing to read "Richard J. Bailey, Jr.", written in a cursive style.

Richard J. Bailey, Jr., PhD.  
President, Southern Oregon University

# **Student Core Information System Replacement Project (CISR) Report**

# Future Meetings

# Adjournment