



OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

June 10, 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.

Reports on the agenda include a Provost's report consisting of an update on the Statewide Provost's Council; faculty engagement and communication regarding SOU's vitality planning; and an update on the impacts of the proposed SOU Vitality Plan on fall registration. A Student Affairs report will contain highlights of this departmental unit; student engagement and communication regarding SOU's vitality planning; an overview of Belonging and Engagement at SOU. There will be an Admissions & Financial Aid report including a review of the Fall 2026 admissions funnel and fall enrollment projections; an enrollment marketing update; and the administration of financial aid programs and the Free Application for Federal Student Aid. An Enrollment Management report will provide a review of enrollment and student demographic data and the retention program, "ReUp with SOU."

Other information and discussion items include a review of the Academic and Student Affairs scope of the SOU Vitality Plan, and updates on accreditation as well as the student Core Information System Replacement (CISR) project.

The meeting will occur as follows:

Wednesday, June 17, 2026

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

Visit governance.sou.edu for the meeting materials.

SOU Ashland Campus, Hannon Library, Meese Room

1290 Ashland Street, Ashland, OR, 97520

To view the proceedings, visit <https://sou.zoom.us/j/88032634954> 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. Accommodation requests should be made at least 48 hours in advance.

Public Comment

The Board of Trustees welcomes public comments. 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 to the Board of Trustees at trustees@sou.edu or by phone at (541) 552-8055.
- Written comments can be submitted via email to trustees@sou.edu. Please include “Public Comments” in the subject line. Written public comments may also be delivered by hand or mailed to the SOU Board of Trustees, 1250 Siskiyou Boulevard, Churchill Hall, Room 107, Ashland, OR 97520.

Those who sign up will need to provide their name, email address, phone number, relationship to SOU, and the subject of their public comments.



**Academic and Student Affairs
Committee Meeting**

June 17, 2026

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Call to Order / Roll / Declaration of a Quorum



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

**Wednesday, June 17, 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/88032634954>**

AGENDA

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

1:00 p.m.	1	Call to Order/Roll/Declaration of a Quorum	
	1.1	Welcome and Opening Remarks	Trustee Iris Maria Chavez
	1.2	Roll and Declaration of a Quorum	Sabrina Prud'homme, SOU, Board Secretary
	1.3	Agenda Review	Trustee Iris Maria Chavez
1:05	1.4	Program and Student Spotlight: Konaway Nika Tillicum	Chava Florendo, SOU, Pre-College Youth Programs
1:10	2	Public Comment	
	3	Provost's Report	Dr. Casey Shillam, SOU, Executive Vice President and Provost
1:25	3.1	Statewide Provost's Council Update	
	3.2	Faculty Engagement and Communication Regarding SOU Vitality Planning	Dr. Casey Shillam
	3.3	Impacts of Vitality Plan on Fall 2026 Registration	Dr. Casey Shillam
1:45	4	Student Affairs Report	
	4.1	Student Affairs Highlights	Dr. Carrie Vath, SOU, Assistant Vice President of Student Life and Dean of Students
	4.2	Student Engagement and Communication Regarding SOU Vitality Planning	Dr. Carrie Vath
2:00	4.3	Overview of Belonging and Engagement at SOU	President Rick Bailey; Jonathan Chavez-Baez, SOU, Director of Belonging and Engagement

Board of Trustees
Academic and Student Affairs Committee Meeting
Wednesday, June 17, 2026
1:00 p.m. – 4:00 p.m. (or until business concludes)

AGENDA (Continued)

- | | | | |
|-----------|----------|---|---|
| 2:15 | 5 | Admissions and Financial Aid Report | |
| | 5.1 | Review of Fall 2026 Admissions Funnel, and Fall Enrollment Projections | Zac Olson, SOU, Assistant Vice President of Enrollment Services |
| | | 5.1.1 Enrollment Marketing Update | |
| | 5.2 | Administration of Financial Aid Programs and the Free Application for Federal Student Aid | Zac Olson |
| 2:30 | 6 | Enrollment Management Report | |
| | 6.1 | Enrollment and Student Demographic Data | Dr. Carrie Vath; Zac Olson |
| | 6.2 | Retention Topic: ReUp with SOU | Zac Olson |
| | 7 | Information, Discussion, and Action Items | |
| 2:45 | 7.1 | SOU Vitality Plan: Review of Academic and Student Affairs Scope | President Rick Bailey |
| 3:35 | 7.2 | Accreditation Update | Dr. Dan DeNeui, SOU, Associate Provost and Director of Graduate Studies |
| 3:45 | 7.3 | Student Core Information System Replacement Project (CISR) Update | Hart Wilson, SOU, CISR Project Manager |
| 3:55 | 7.4 | Future Meetings | Trustee Iris Maria Chavez |
| 4:00 p.m. | 8 | Adjournment | Trustee Iris Maria Chavez |

Public Comment



Provost's Report



Academic and Student Affairs Committee

Provost Report: June 17, 2026

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





Statewide Provost's Council

Statewide
Chief

Transfer Council: shared Gen Ed model workgroup
this summer

Academic
Officer

SOU-RCC Partnership Highlight

collaborations

HB 4124 Update from HECC

Completing my term as SPC Chair – Provost Haggerty
from OSU will assume the role July 1



Vitality Plan Communications

Faculty

- President Bailey's weekly messages
- Deans, Directors & Chairs weekly meetings
- Faculty Senate every other week
- Workgroups
- Transformation Advisory Committee

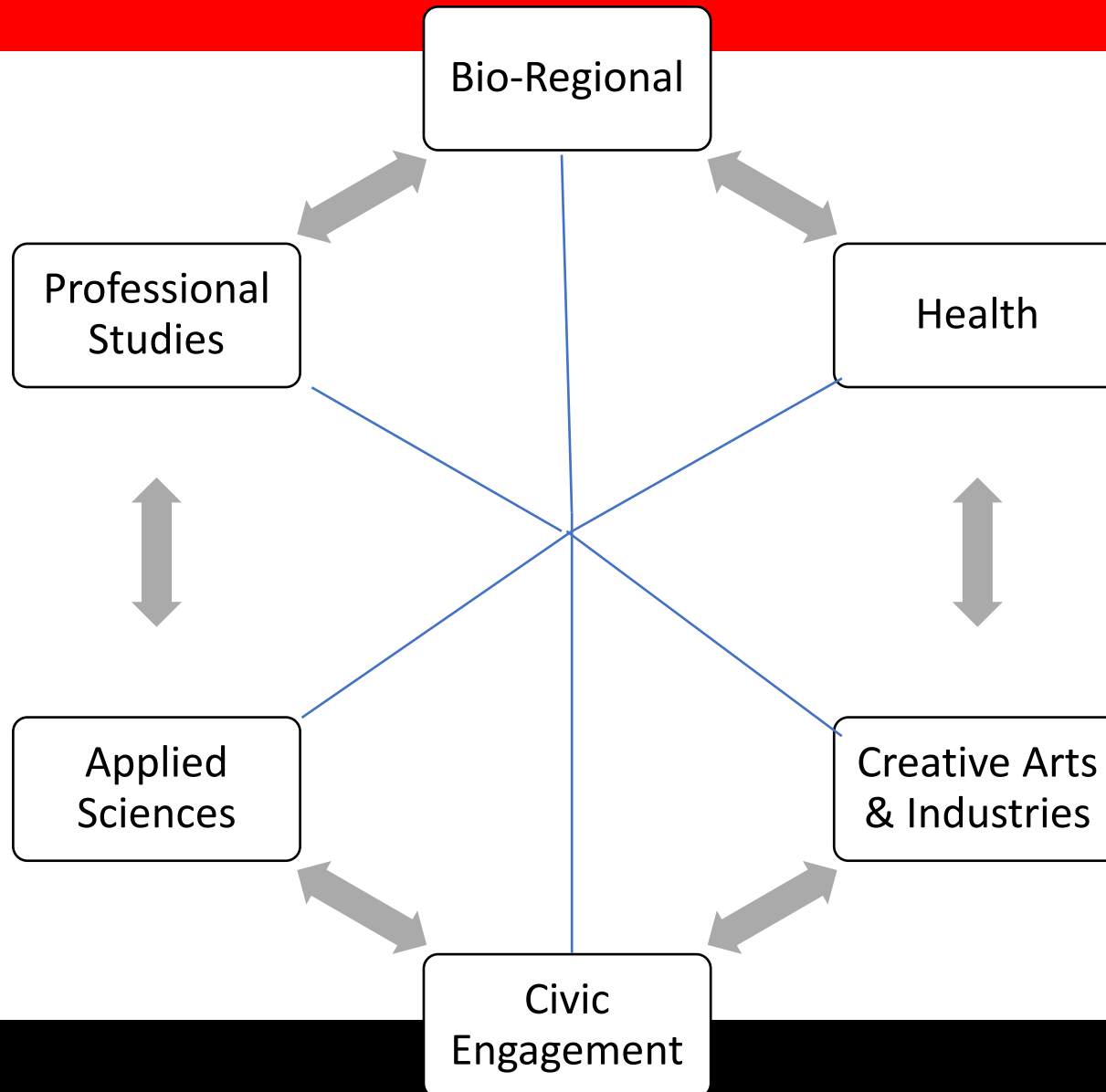
Students

- Workgroups
- Registration and behavioral health support
- ASSOU Townhall
- Faculty Advisors outreach



Vitality Plan Academic Model

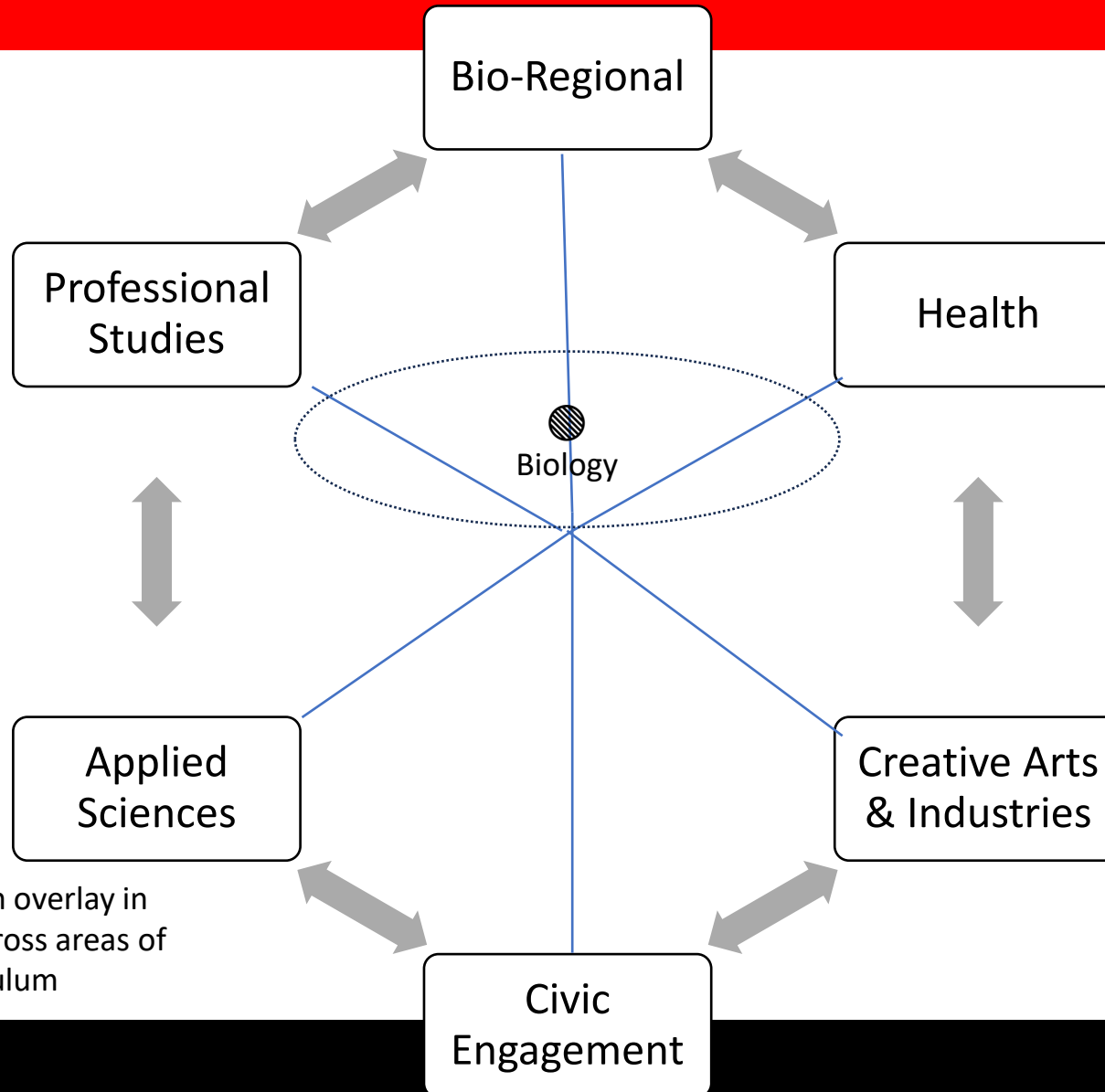
Academic
Cornerstones





Vitality Plan Academic Model

Academic Cornerstones

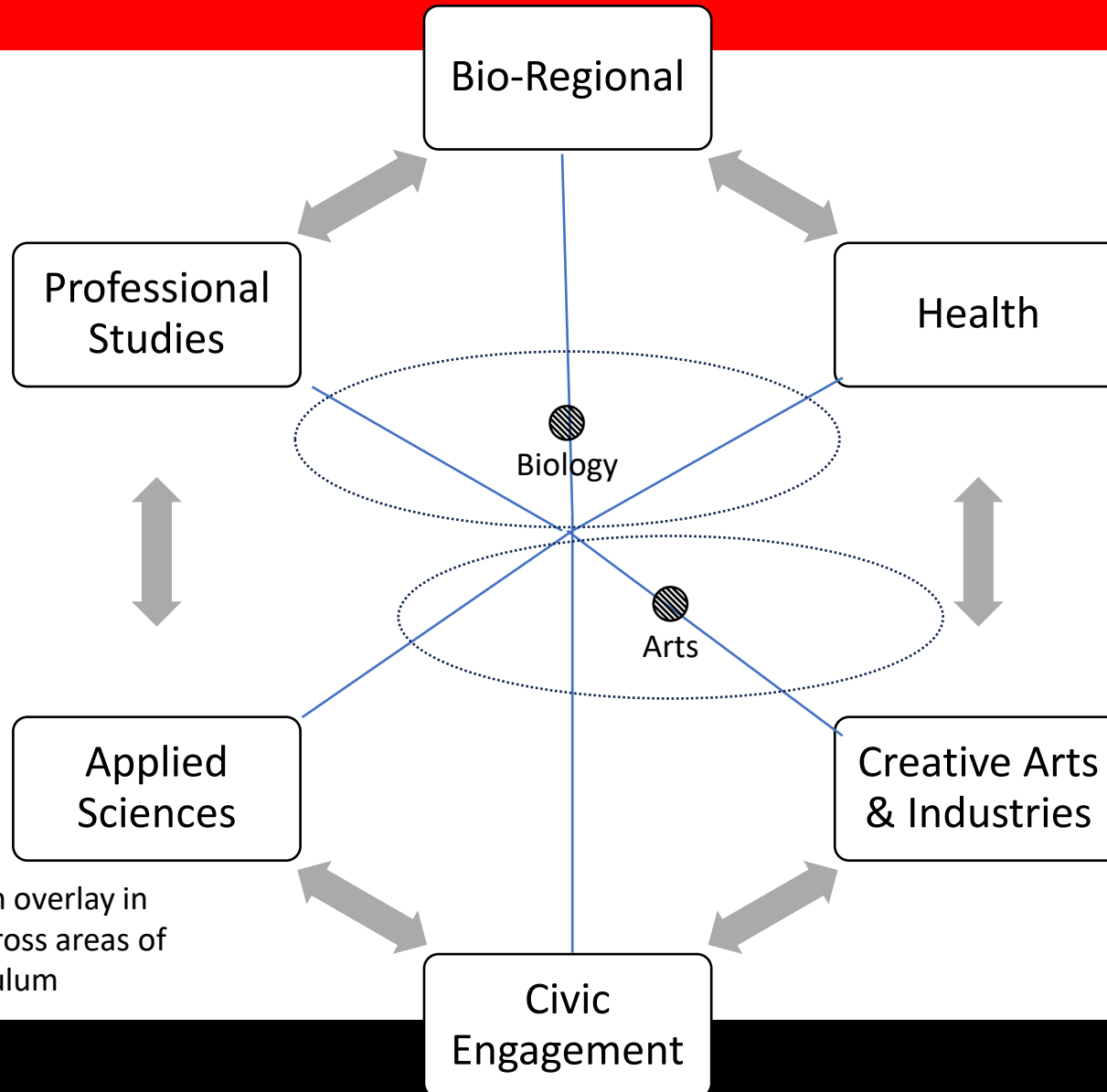


Example of Academic Program overlay in Academic Cornerstones and across areas of potential shared curriculum



Vitality Plan Academic Model

Academic Cornerstones

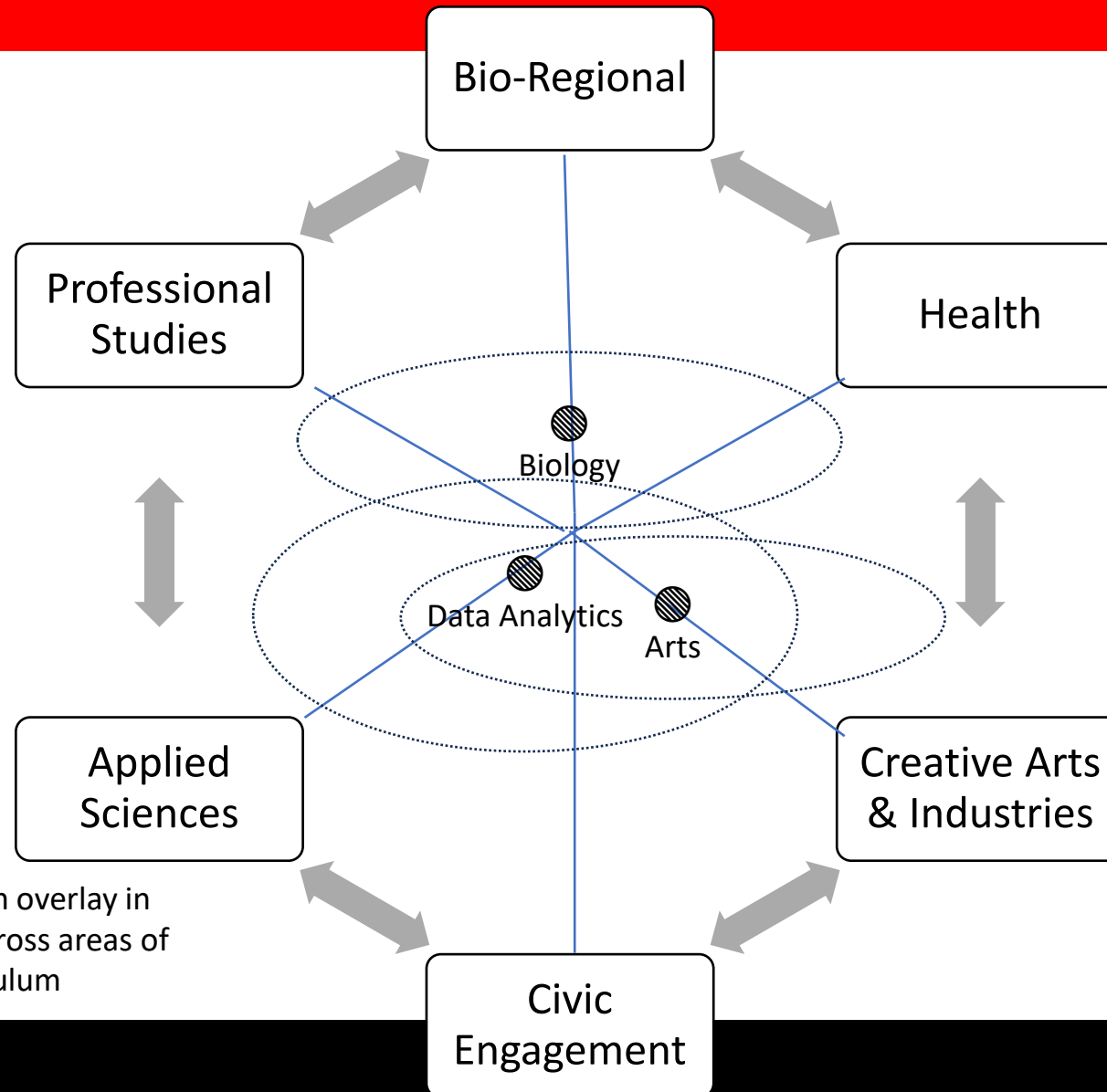


Example of Academic Program overlay in Academic Cornerstones and across areas of potential shared curriculum



Vitality Plan Academic Model

Academic Cornerstones

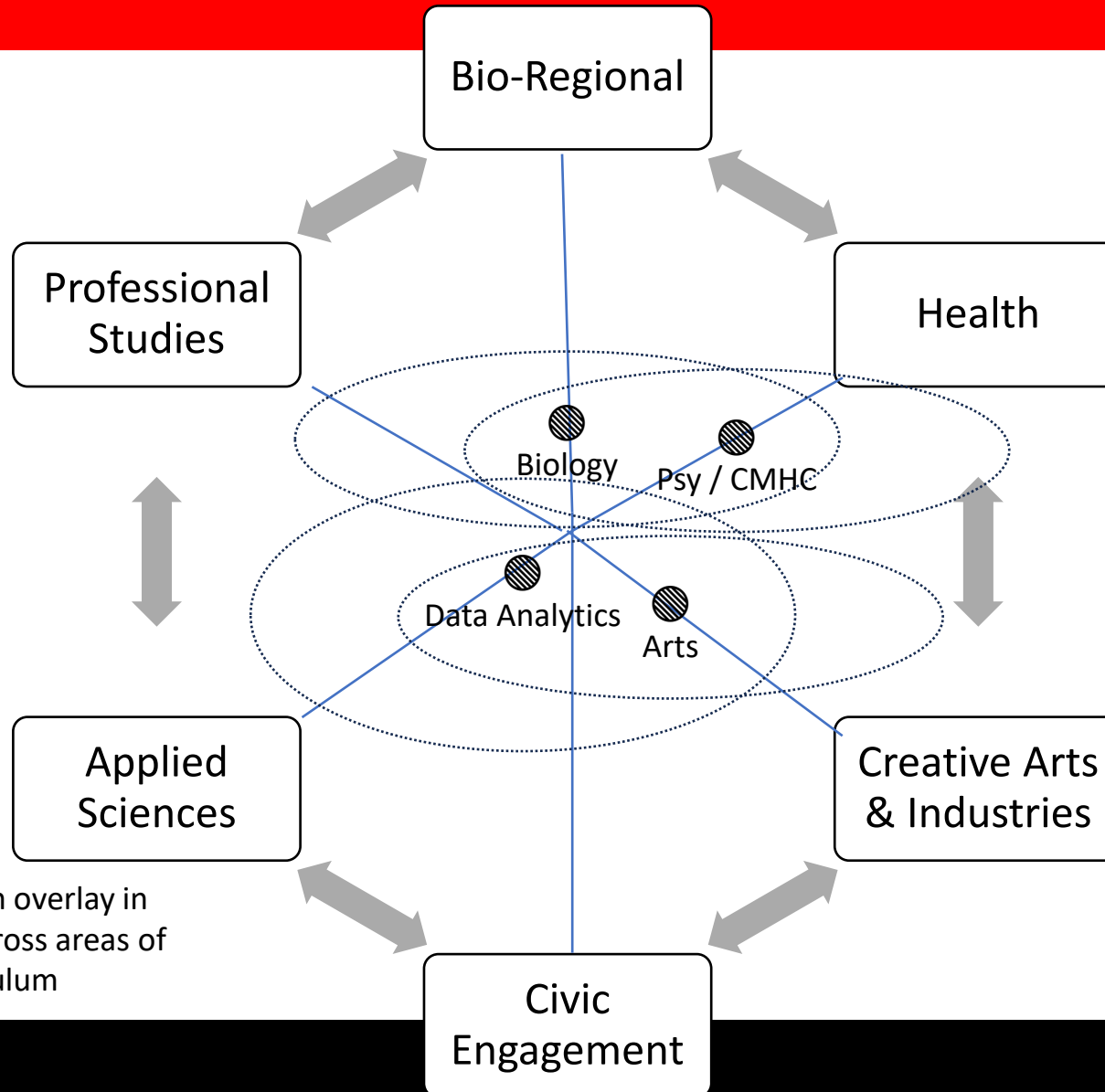


Example of Academic Program overlay in Academic Cornerstones and across areas of potential shared curriculum



Vitality Plan Academic Model

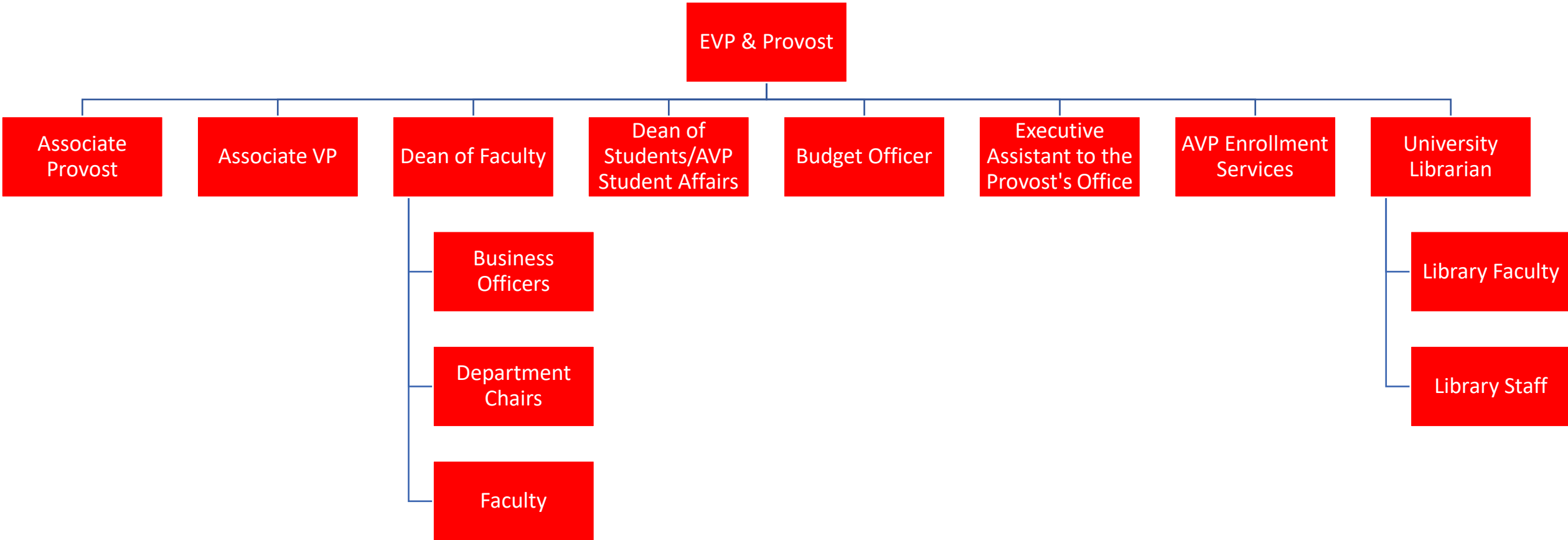
Academic Cornerstones



Example of Academic Program overlay in Academic Cornerstones and across areas of potential shared curriculum



Vitality Plan Academic Model



EVP & Provost

Associate
Provost

Associate VP

Dean of Faculty

Dean of
Students/AVP
Student Affairs

Budget Officer

Executive
Assistant to the
Provost's Office

AVP Enrollment
Services

University
Librarian

Business
Officers

Department
Chairs

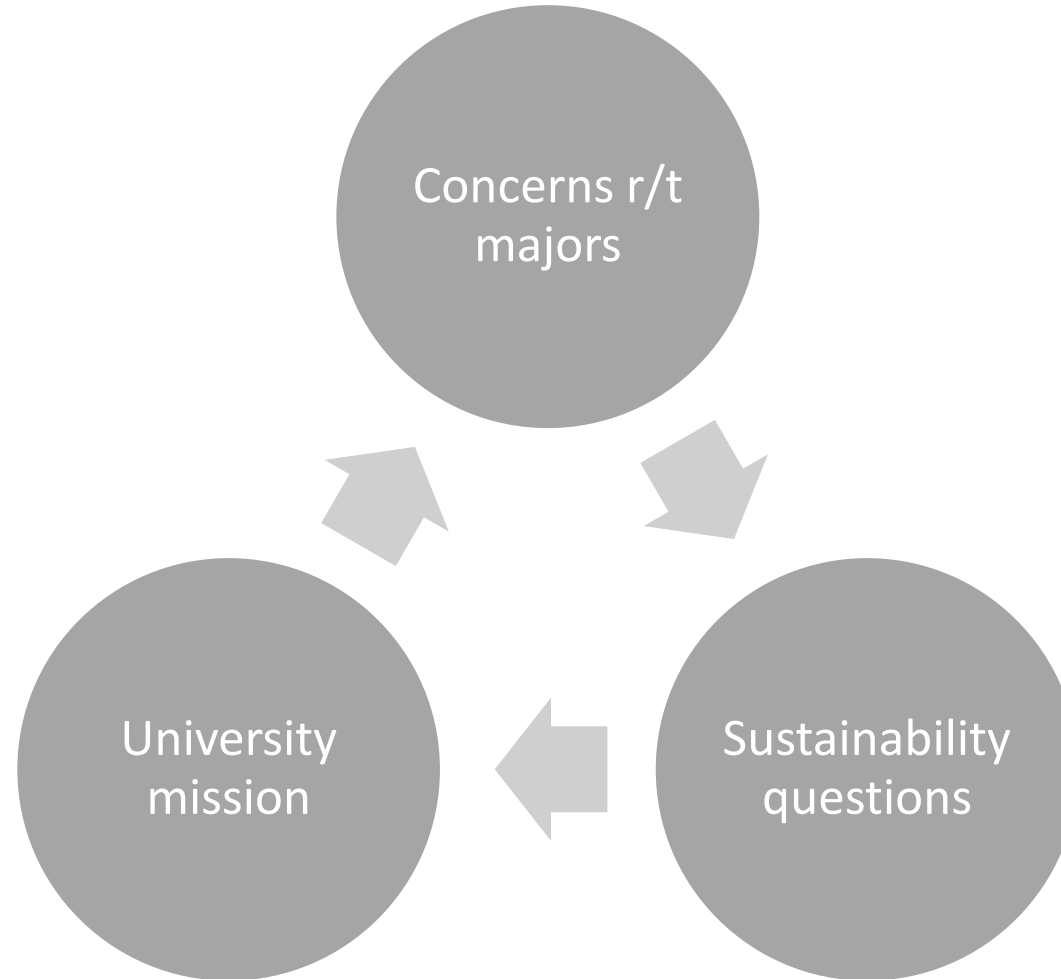
Faculty

Library Faculty

Library Staff



Vitality Impact on Fall Registration





Preparing for Fall



Workday
Onboarding
Workshops

Faculty
Advisor
Outreach

Transfer
Student
Appointment
Campaign

SSC
Registration
Drop-in Hours

Admitted
Students
Events

Special Population
Registration
Sessions

Student Affairs Report

Student Affairs Program Highlights

Cause Awareness: June
LGBTQIA+ Pride Month
Learning Disability Week
Black Music Month



Cause Awareness:
World Environment Day (6/5)
Autistic Pride Day (6/18)
Juneteenth (6/19)
National Indigenous Peoples' day (6/21)

Dr. Carrie Vath
June 17, 2026

Updates

- ASSOU Re-Elects Sophia Smith and Lillian Alexander for President & Vice President
- ASSOU Senate Re-Elects Kal Peterson for Speaker of Senate
- Commencement



Spotlights:

CampusESP:

- Building Connections (January-July)
 - Featured Student Affairs team members every 2 weeks (142 clicks to date)
- Utilization of Advertisements
 - Winter term: Care Packages available through Bookstore (2,903 Impressions)
 - Winter/Spring: Get involved-Highlighting HawkNEST (511 impressions)
 - Spring: Commencement 2026 (235 Impressions)



Building Connections: Meet Enicia-Ann Fegurgur

Posted 4 months ago in Parent & Family News, Student Success, Career Support.

As the Coordinator for Career Connections at Southern Oregon University, I have the rewarding opportunity to support and guide your students on their career journey. Whether it's exploring different career paths, seeking internships and job opportunities, or refining professional documents like resumes, I am here to assist them every step of the way. Additionally, I help students navigate the process of searching for and applying to graduate programs. One of my favorite aspects of

Hawk N.E.S.T.

News, Engagement, Support, & Teamwork

More Than Just Classes: Explore Upcoming Club Events Today

Encourage your student to find their community! Browse our public events tab to see the workshops, socials, and activities happening on campus —no login required for families to explore.

[Find a Club Event](#)

FIRST DESTINATION SURVEY INSIGHTS ON THE CLASS OF 2024-2025

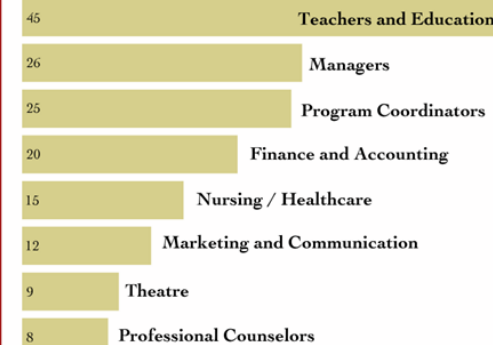
TOP EMPLOYERS

Who employed the most recent graduates from the class of 2025?

- Southern Oregon Education School Districts (18)
- Asante (9)
- Southern Oregon University (8)
- Oregon State Government (6)
- Rogue Community College (5)
- Lithia & Driveway (3)

TOP INDUSTRY & JOB ROLES

What types of jobs are they doing?



MEDIAN SALARY

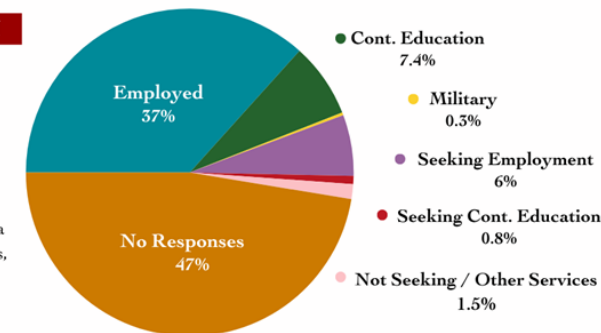
Calculated from reported salaries in the First Destination Survey

\$46,800 Bachelors
\$80,000 Masters

OUTCOMES AFTER GRADUATION

Data was collected as part of the First Destination Survey (FDS), tracking recent graduate outcomes. FDS is part of a larger national effort through the National Association of Colleges and Employers (NACE).

The 2024-2025 Response Rate was 26%, to which a Knowledge Rate was added from in-person reports, faculty & staff knowledge, LinkedIn, and other sources to achieve an Overall Rate of 53%.



CONTINUING EDUCATION

Of the 54 students reported as continuing on to further education, the most popular options were:

- Southern Oregon University (27)
- Oregon State University (2)
- University of Southern California (2)

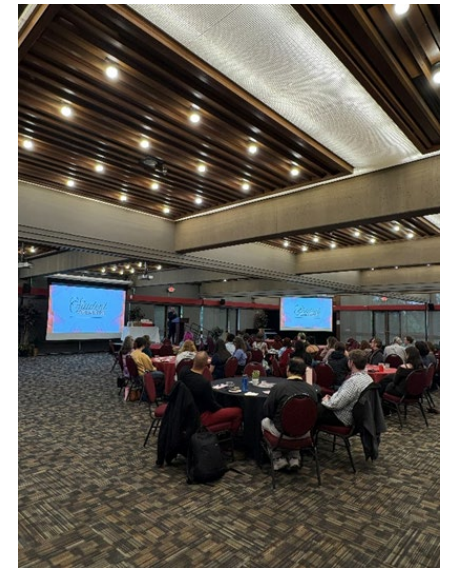
Other destinations for the class of 2025 included: Western Washington University, University of St. Andrews, San Diego State University, University at Buffalo - SUNY, Western Governors University, Johns Hopkins University, William Jessup University, University of North Dakota, Lewis & Clark College, Washington State University, IU International University of Applied Sciences, Portland State University, George Fox University, Bath Spa University, University of Northern Colorado, Oregon Health and Science University, University of Oregon, Tufts University, Belmont University, Eastern Oregon University, and Colorado State University.



Pride Points:

Career Connections

- Career Fair: The April career fair had 60 employers and 5 SOU departments registered; 200 students attended.
- Student Worker Appreciation Event: 31 students and 19 supervisors attended.
 - Celebrated Student Worker of the Year - Eli Samas
 - Celebrated Supervisor of the Year - Marc Overbeck



Pride Points: Dean of Student Office

- Care Team, Basic Needs & Food Pantry
 - Received \$3,800 Wesley Foundation Grant to support the Sensory Room
 - Started a **Clothing Closet** for students in the SU and collaborated with the Honors College/Program to transition their clothing closet oversight to the SU
 - Applied for the **Change for Good** Grant from Ashland Co-Op, and made it to the voting round. Make sure to get out and vote for the SOU Food Pantry
 - 2nd place for the University Category of the **Governor's Food Drive**
 - Over **\$12,000 fundraised** to support the Campus Food Pantry
 - 1st Place: Oregon State University – 92 Meals per employee
 - 2nd Place: Southern Oregon University Student Food Pantry – 53 Meals per Employee
 - 3rd Place: Eastern Oregon University – 34 Meals per employee
 - Established a new relationship with **Grocery Outlet** for weekly donations
 - 30 Graduating seniors have rented **Caps and Gowns** from the SOU Food Pantry
 - **1071 student visits (as of 5/29/26)** to the SOU Food Pantry for spring 2026 term compared to 757 from Spring 2025 term. This is a 41% increase in pantry usage even prior to term ending.
 - SOU Care Team has created and responded to 179 Care Cases between March 30th and June 1st.

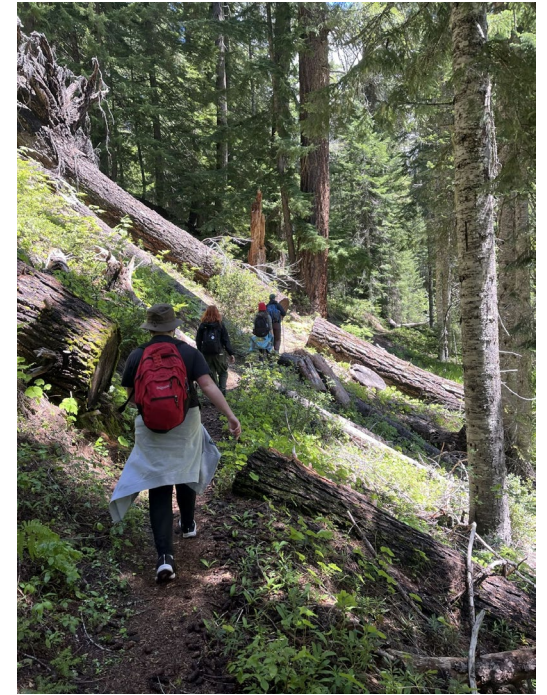
Campus Recreation

- The Student Recreation Center averaged 1,360 visits per week between March 30-May 23 (week 1-week 8)
- The Climbing Center averaged 117 visits per week between March 30-May 23 (week 1-week 8)
- About 200 students participated in Intramurals/Rec Sports programs (drop-in events, leagues, and tournaments) during the 25-26 academic year
- We hosted 6 drop-in Rec Sports events and 1 league during spring term. Two standout events were our Sand Volleyball League with four teams and our drop-in Softball tournament with 25 participants.
- The climbing center hosted 25 events during the 25/26 academic year
- The Outdoor Program hosted 21 events and trips during the 25/26 academic year
- The Outdoor Program generated \$27,690 in revenue during the 25/26 academic year



Disability Resources & UCAM

- 95 students with disabilities are graduating with this cohort! Compare to 58 in Spring 2025.
- 14 new incoming students, DR & UCAM are onboarding
- Spring term saw 476 students active with DR; (460 Winter 2026; 481 Fall 2025)
- To date, we've proctored 75 exams, with Spring finals week still pending.
 - Winter 2026 exams total: 114
 - Fall 2025 exams total: 129
- UCAM 26-27 contracts have been sent out to new and returning students, projecting full-coaching loads for three full-time coaches.
- Scholarships available for students with qualifying financial need
- Rough Rider Fall's hike Saturday, May 30th; one of our annual social events in the spring



Veteran Resource Center

Spring Headcount

- 166 SMVF
- 152 VA Benefits Users

• Spring Ch 33 Expected

Amount: \$269,947.89

- Little lower than Winter 26 (\$274,000) and Fall 25 (\$296,000)

• Spring 2026 Engagement to date:

- 513 in-person service encounters
 - (17% Increase from Winter 2025)
- 118 unique individuals engaged with the VRC
 - (7% Increase from Winter 2025)

Success at Southern-TRIO

- In April, in celebration of Earth Day and National TRIO Day of Service, we took a group of students in partnership with RCC to the coast to do a community service project - beach clean up. RCC provided 2 professors to give some information sessions about the ecology of the redwoods as well as the beach.



University Housing

- The conference season started strong. We are fully booked for summer and have turned away over 30 groups due to lack of space with the loss of the Cascade buildings.
- RHA has had several successful events over the past two terms and will culminate their programming for the year on June 2nd with the Spring Pancake Feed. This will be a scaled-down event to be more in line with the need to cut costs in relation to the transition plan. No worries—there will still be a plethora of karaoke options for all. Other successful events include:
 - Smores Event- 93
 - Consent Carnival 73
 - Raider Round Dance with NASU 59
 - Valentine’s Day Cards 22
 - Floor v floor 50
 - Casino Night with RAs 92



Overview of Belonging and Engagement at SOU



Office for Student Belonging & Engagement

June 2026

Our Commitment

Create a campus where all SOU students thrive by creating a strong sense of belonging, connection, and academic success through intentional, culturally responsive, community-rooted support and programming, with special attention to first-generation, low-income, and underrepresented students.

Student Connection

- **Event Planning Involvement Committee (EPIC)**
The Student Programming Board works to enhance the campus community by providing entertaining, educational, and socially engaging opportunities

Total Events: 45+ events

Student Reach: approximately 2,000 participants

- **Club Board of Advisors (CBA)**
Student-led organization that supports campus clubs and is responsible for budget allocation, training, and hosting campus-wide engagement events

Total Events: 5

- **Social Justice Equity Center (SJEC)**
Endeavors to create an inclusive program that promotes academic achievement, celebrates diversity, and supports the rich life experiences of the SOU community.

Total Events: 75+ events

Student Reach: approximately 1,200 participants

Campus Programming (Highlights)

- **Fall Club Involvement Fair:** opportunity to explore SOU's student-run clubs and discover activities that match students' interests.
- **SO Pride Parade 2025:** March part of the SOU float in the Pride Parade. Opportunity to celebrate visibility, community, and love while representing SOU loud and proud.



SOUTHERN OREGON UNIVERSITY OFFICE of
STUDENT BELONGING
— A N D — **ENGAGEMENT**

- **Therapy Dogs:** Woof-Woof Wednesdays and Therapy Dog Thursdays provide a unique opportunity to pause from the demands of daily school life and spend time with friendly therapy dogs. These events create a welcoming space for students to relax, recharge, and enjoy the comfort and companionship that therapy animals bring.
- **3rd Annual First-Gen College Student Celebration:** Connect, share stories, and celebrate the journey during National First-Generation Week! We're recognizing the strength, resilience, and joy of first-generation students. Meet the staff, faculty, and peers around you who are trailblazers—the first in their families to pursue higher education!
- **Trans Day of Remembrance:** Learn, Play, Remember, and Celebrate! All are welcome! Let's stand together, reflect, and celebrate the beauty and strength of trans lives.
- **Bringing Culture to the Table:** Reclaim Thanksgiving by coming together with Multicultural Clubs across campus to enjoy traditional foods. SJEC assisted with the event.
- **Voices of Democracy:** a 3-part lecture series exploring Free Speech, Conflict Resolution, and Free Speech in the media during the Civil Rights Movement. Voices of Democracy invites participants to examine freedom of speech and civil discourse, while exploring how free expression in the media was essential to advancing the Civil Rights Movement.
- **Stevenson Union Open House:** Enjoy snacks, pick up giveaways, and discover all the resources and services Stevenson Union has to offer. Collect stamps for a big prize, grab surprise giveaways at every office, meet staff, connect with fellow students, and learn more about the valuable programs and support available at SOU and located in the Stevenson Union, third floor.
- **Femme Collective Wednesdays:** Come join us for an affirming and exploratory affinity group. This is a space to celebrate femininity, to foster a sense of community, share experiences, and uplift one another through meaningful discussions and activities. This space is all about personal growth, mutual support, and collaboration.
- **Pajama Jammy JAM:** LACE up and ROLL out! A night filled with funk, soul, hip hop and nonstop vibes. Bring your flyest fit and smoooooothest moves for an



SOUTHERN OREGON UNIVERSITY OFFICE of
STUDENT BELONGING
— AND — **ENGAGEMENT**

evening of skating! Come celebrate Raider joy and culture. Proudly sponsored by the SOU Black Student Union and Campus Partners.

- **Stuff-A-Plush:** Join us in the SJEK for Stuff a Plush! Pick your favorite stuffed animal, stuff it yourself, and take home a cozy new friend while supplies last.
- **Tran Day of Visibility:** Join us for a joyful gathering as we honor and uplift trans lives. This is a space to be seen, to be heard, and to connect with others in community. Come as you are, bring your friends, and be part of an afternoon full of laughter, games, and meaningful connection.
- **Multicultural Commons Open House:** Come see what makes the Multicultural Commons a favorite gathering spot on campus. This welcoming and inclusive space provides opportunities to connect with others, engage in meaningful conversations, study in a supportive environment, and enjoy community-building activities. Whether you're new to campus or already part of the community, we invite you to stop by, meet new people, and experience all that the Commons has to offer.
- **West African Drum/Dance Workshop:** Come learn traditional rhythms and dances from Guinea, West Africa. Drumming experience required.
- **Fiesta Latina: Cinco de Mayo Week:** Celebrate Latino/a/x/e culture with a week of exciting events and community connection! Enjoy a delicious taco sale, vibrant folklórico dance performances, live music, game night, movie night, and a festive dance night featuring salsa band Son de Cuba. Join us as we honor the rich traditions, culture, and contributions of the Latino/a/x/e community through food, music, dance, and fun.
- **Raider Academy Awards:** This event is dedicated to celebrating and recognizing the outstanding contributions of our club leaders and Stevenson Union employees. Throughout the year, these individuals have demonstrated leadership, commitment, and service in creating engaging programs, supporting student organizations, and fostering a vibrant campus community. Join us as we express our appreciation for their hard work, achievements, and the positive impact they have made on the student experience.
- **EPIC Spring Carnival:** Our end-of-the-year celebration packed with fun for everyone! Enjoy live music, laser tag, carnival games, a dunk tank, rock wall climbing, face painting, caricature art, tarot readings, and a free photo booth.



Plus, enjoy free snow cones, cotton candy, popcorn, hot dogs, and food truck favorites. Bring your friends and celebrate the end of the term with an afternoon and evening full of entertainment, food, and community. We have it all!

- **Lavender Grad Celebration:** This ceremony is a festive and affirming event that celebrates and recognizes graduating seniors who identify as queer or feel connected to the queer community.
- **Si Se Pudo Graduate Celebration:** Third Annual Sí Se Pudo Graduate Celebration as we honoring the achievements of Latino/a/x/e graduates. This special ceremony recognizes academic success while embracing the culture, traditions, and heritage that bring our community together.

Collaborations & Outreach

- **Ashland High School BSU Support:** Serving as an advisor to the high school cohort and helping them connect to their culture and other black leaders.
- **Red Cross Blood Drive:** In partnership with the Red Cross, we support and host blood drives at SOU to help meet the ongoing need for lifesaving blood donations. These events provide students, faculty, staff, and community members with an opportunity to make a meaningful impact by donating blood. Through these drives, we promote community service, civic engagement, and the importance of giving back to help save lives.
- **Jackson County Fuel Committee (JCFC):** Helping JCFC provide heat generating firewood for people in need throughout southern Oregon.

Looking Ahead

- Social Justice Equity Center Student Survey
- 2025-2026 Programming Assessment
- 2025-2026 Department Assessment Report

Admissions and Financial Aid Report

June Updates

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

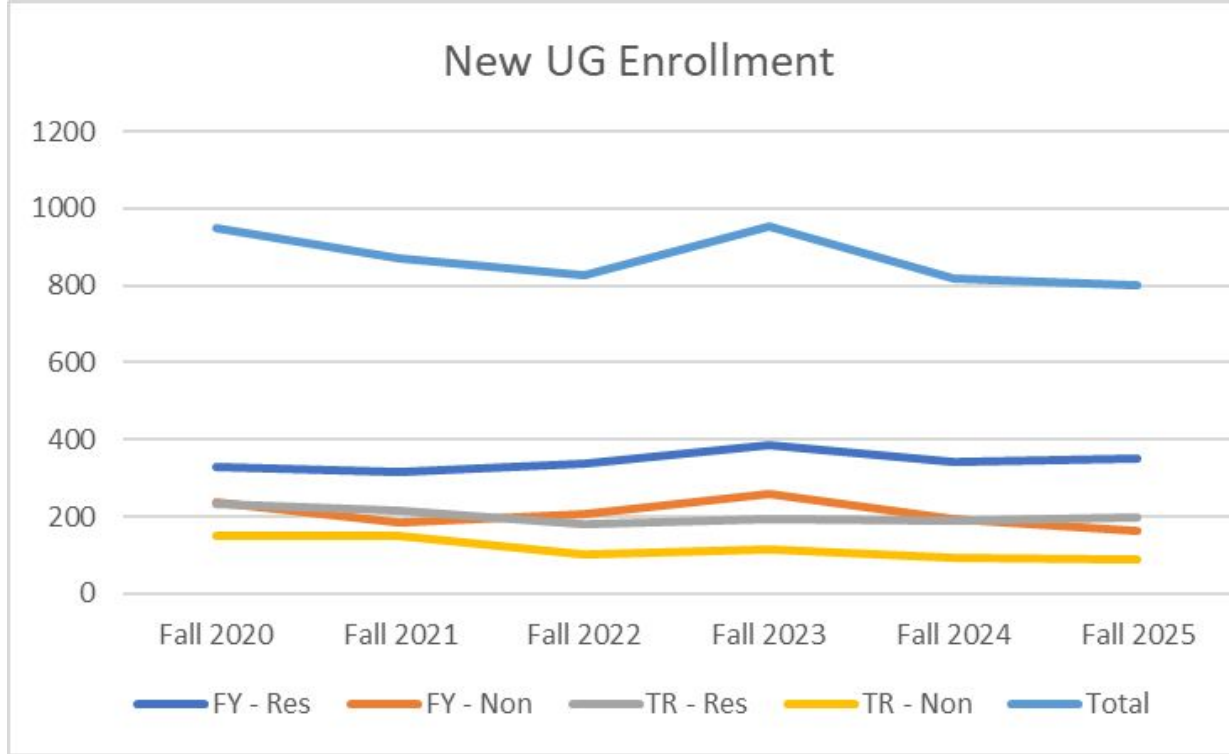


Zac Olson, Assistant Vice President of Enrollment Services

June 17, 2026

Historical Trends

New UG Enrollment



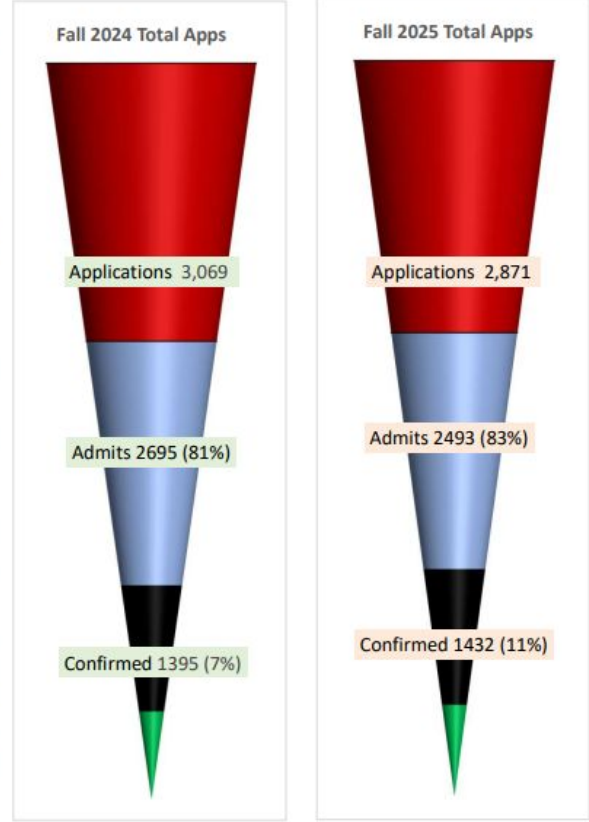
Funnel Report: New Applicant Headcount by Student Type
Fall 2024 Week Ending 10/20/24 vs. Fall 2025 Week Ending 10/19/25
4 Weeks After Start of Term

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%
Total Apps	3,069	2,871	-198	-6.5%

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%
Total	2,695	2,493	-202	-7.5%

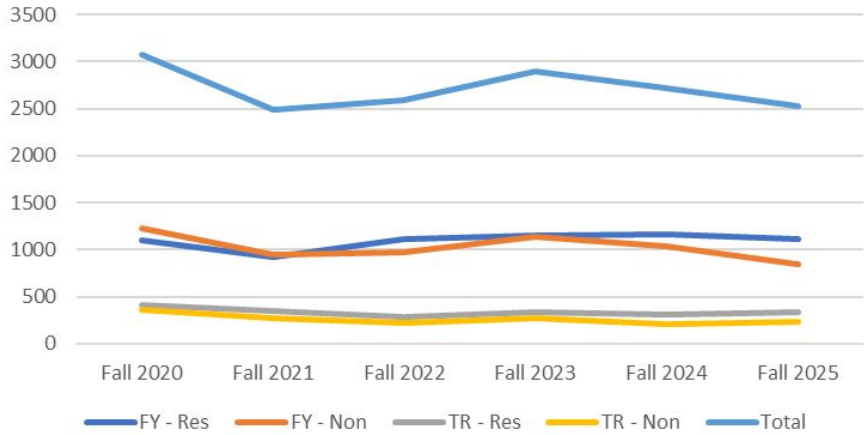
Confirmed				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	497	508	11	2.2%
Freshmen - Nonresident	293	309	16	5.5%
Transfer - Resident	243	249	6	2.5%
Transfer - Nonresident	129	137	8	6.2%
Postbacs/Grads	233	229	-4	-1.7%
Total	1,395	1,432	37	2.7%

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%
Total	974	964	-10	-1.0%

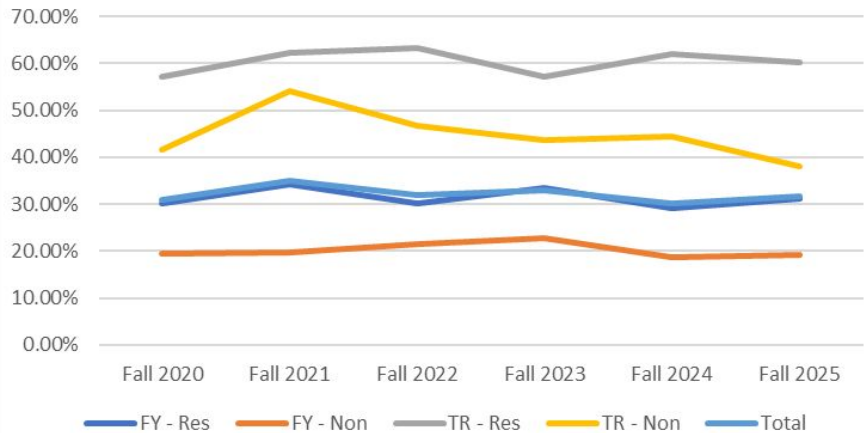


Trends Con't

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%

*Fall 2026 Funnel as of 5/31/26

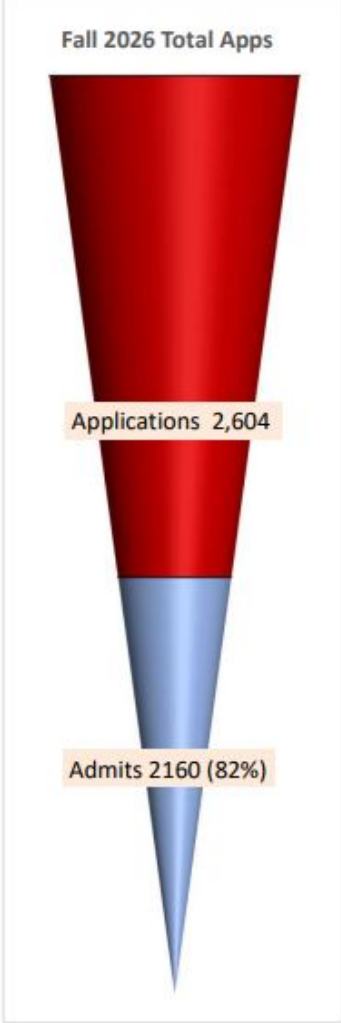
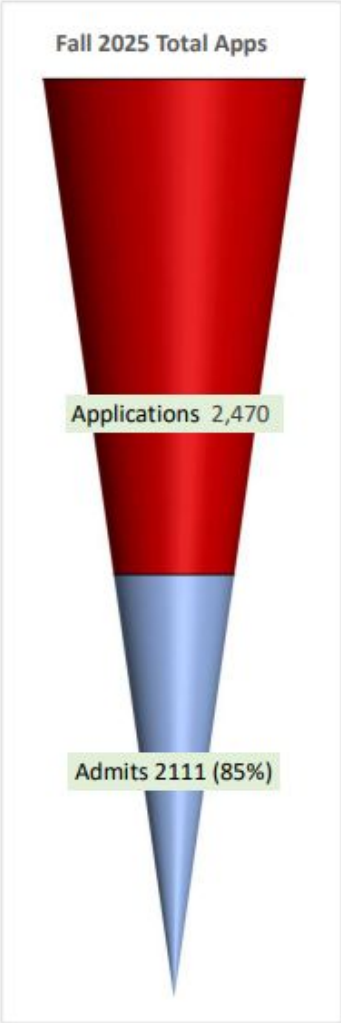
Funnel Report: New Applicant Headcount by Student Type
Fall 2025 Week Ending 6/1/25 vs. Fall 2026 Week Ending 5/31/26
16 Weeks Before Start of Term

Applications				
Student Type	Fall 2025	Fall 2026	Change	% Change
Freshmen - Resident	1,055	1,098	43	4.1%
Freshmen - Nonresident	819	813	-6	-0.7%
Transfer - Resident	211	221	10	4.7%
Transfer - Nonresident	179	138	-41	-22.9%
Postbacs/Grads	206	334	128	62.1%
Total Apps	2,470	2,604	134	5.4%

Admits				
Student Type	Fall 2025	Fall 2026	Change	% Change
Freshmen - Resident	984	1,012	28	2.8%
Freshmen - Nonresident	737	732	-5	-0.7%
Transfer - Resident	172	164	-8	-4.7%
Transfer - Nonresident	119	104	-15	-12.6%
Postbacs/Grads	99	148	49	49.5%
Total	2,111	2,160	49	2.3%

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

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



Office of Admissions

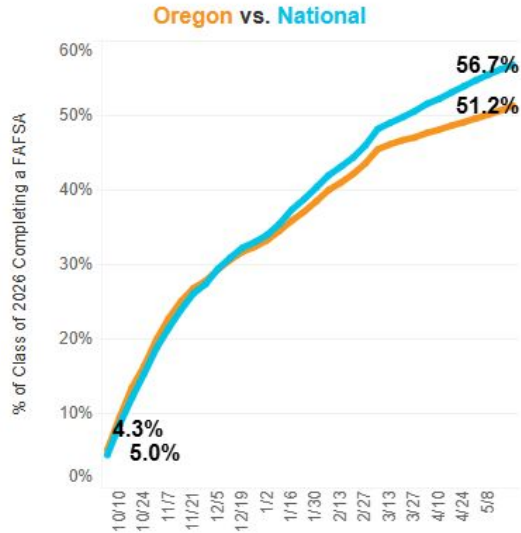
- Focus on Yield
 - Admit no Deposit campaigns
 - Raider Social Events
 - Advising/registration
 - Multiple channel communication: email, text, phone, print mail, parent portal, social media...
- 61 application workshops, 239 HS/CC visits, 195 college fairs
- Common App operational on Feb 2, has generated 194 applications (100+ from OR)
- RCC/SOU partnership
- New \$100 Advanced Tuition Deposit (workflow item in Workday has improved funnel fluidity)
- Re-Enroll Campaign (TRU's + PSU), early July launch
- EAB Enroll360 update



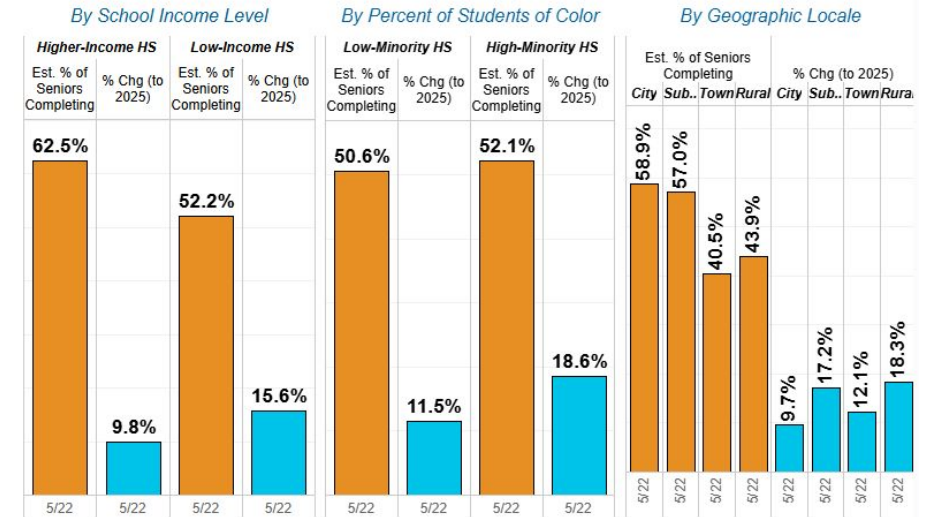
Financial Aid

- Con't remissions work
- Workday Updates (packaging)
 - 6799 ISIR's processed
 - Packaging continues
 - PELL
 - OOG
 - SEOG
 - Work Study
 - LOAN
 - FORD/OSAC scholarships
 - Foundation scholarships
 - Remissions
 - etc.
- Peer Mentors
- FAQ updates on FA website (<https://sou.edu/financial-aid/>)

Estimated Percent of Seniors Completing a FAFSA



Est. % of Seniors Completing a FAFSA & Year-Over-Year % Change in FAFSA Completions by High School Characteristics (Oregon)



Outreach & Engagement

Dual Credit

Early Entry students have been applying and registering through Workday - it's been a smooth process from the student perspective! ASC students and faculty will go live on the platform starting in the fall term.

25/26 Early Entry - (HS students taking classes directly with SOU faculty on-campus or online)

of enrollments in SOU courses: 72

of student credit hours earned: 229

25/26 Advanced Southern Credit

of high schools that offer SOU credit: 29

of high school teachers that serve as SOU affiliate faculty: 143

of SOU courses offered through ASC: 323

of enrollments in ASC courses: 5,686

of student credit hours earned: 21,440

In collaboration with the Spanish department, 16 students have participated in the Foreign Language Proficiency program this spring, where they have earned 332 Spanish credits of 100 and 200 level coursework.



Outreach & Engagement

Pirates to Raiders

- 17 graduates, of these graduates two are Valedictorians
- Average GPA of 3.28
- 46 family members attended their graduation celebration and 14 graduates.
- 22 of our P2R middle school students visited campus for our 5 de Mayo celebration where they got to tour around campus, eat some tacos from LSU's Taco sale and watch the ballet folklorico performance.

Best of the Best

16 high schools participated in a seminar day consisting of workshops with SOU art faculty in addition to having their work displayed at the Grants Pass Art Museum.

Brain Bowl

The 49th annual Brain Bowl finals took place at SOPBS. This year's champions were The Cascade Christian Challengers (Varsity Division A), The Chesterton Saints (Varsity Division B), & The Logos Legends (Junior Varsity).



Outreach & Engagement

Summer Camps

ACADEMY will take place June 21 - 27th and is looking forward to having 97 students on campus. 5th - 10th grade. We introduced a brand new Session 3 Leadership program this year that will have 16 students.

Konaway Nika Tillicum will take place July 11 - 18 and has accepted 67 students. We are partnering once again this year with OSF to host an art pre-camp that is fully donor funded.

Black Youth Summer Institute occurs July 12- 17 has 84 applicants, but are selecting 55 students to join us due to budget constraints.

Academia Latina (July 19-25) has accepted 100 students for the main program, and 32 for Leadership (July 17 - 25). Both programs have a waitlist of over 50 students who would like to get in!

Summer Better Than Others - 32 different class offerings starting at the end of June and going through until July 31. Several classes have sold out.

<https://youth.sou.edu/camps/summer/>



International Programs

Exchange Programs for 2025-26

Incoming International Exchange Students:

- 8 international students from 6 of SOU's exchange partner schools
 - France - University of Lille
 - Japan - Okayama University and Tokyo International University
 - South Korea - Chonnam National University and Dankook University
 - United Kingdom - University of Winchester

International Programs welcomed exchange students with orientation, advising and cultural activities throughout southern OR and PNW.

Outgoing SOU Study Abroad Students:

- 23 SOU students studied abroad at partner universities and program providers including:
 - 6 exchange partner universities in Germany, Japan, Mexico, South Korea, Uruguay and United Kingdom
 - 5 partner program providers in Italy, Japan Panama, Spain and Sweden

International Programs is excited to announce 16 students have been selected to study abroad for summer and fall 2026 at partner schools in France, Germany, Japan, South Korea, Sweden and the United Kingdom. And 5 received scholarships from a generous community donor to support their study abroad.



Questions?

Enrollment Marketing Update



CULTIVATE

Build Your Pipeline

- **Description:** Omni-channel campaign to create and nurture inquiries for future entering classes
- **Call-to-Action:** Receive informational offer to learn more about Southern Oregon
- **Audience:** Newly purchased sophomore and junior names, full sophomore and junior inquiry pool, and their parents
- **Channels:** Direct Mail, Email, Offer, Landing Pages, Conversation Agent, and Paid Social Ads

APPLY

Drive Applications

- **Description:** Omni-channel campaign to build immediate demand and optimize application submission activity
- **Call-to-Action:** Apply for first-time, first-year admission at Southern Oregon
- **Audiences:** Inquiry pool records, newly purchased records, previously purchased records, and parents
- **Channels:** Direct Mail, Email, Landing Page, Conversation Agent, SMS Texts, and Paid Social Ads

List-Source Strategy

- Deep dive zip code analysis
- List-source diversification and saturation strategy
- New market model for lookalike zips
- Proactive adjustments based on list-source volatility
- Subscription strategy and management

List Acquisition and Management

- Subscription level alignment and recommendations
- Segment setup and ordering
- Name deduplication and data cleansing
- National change of address processing
- Ongoing monitoring of available counts
- Monthly deployment to new names (all channels)
- Pioneer new list opportunities

Parent Audiences

- Recurring parent data collection from students
- Consumer database partnership
- Consumer database match for parents
- Parent email campaign creative creation
- Multilingual translation option for parents
- Dedicated parent landing page
- Paid social ad campaign for parents
- Informed Delivery parent targeting

Paid Social and App Ad Management

- Meta account management
- Snapchat account management
- TikTok account management
- College Board Connections account management
- Static and motion ad creation
- List match coordination with overall campaign
- Ongoing audience updates across channels
- Image-based performance optimization
- Copy performance optimization

Email Deliverability

- Dedicated domain creation to protect .edu
- Domain warming
- Dynamic email audience modulation
- Ongoing monitoring and risk management
- Third-party tracking and triage

Print Channel Management

- Paper inventory acquisition
- Fold and insertion programming
- QR code creation
- Link alignment
- Username and password drop in
- Timing alignment to other channels
- Postage acquisition
- Direct mail expertise and strategy
- Informed delivery coordination and setup
- Mail tracking and measurement

Creative Development

- Develop multiple paper mailings
- Write 60+ student emails
- Create 15+ paid social ad variations
- Create Informed Delivery ad set
- Create College Board Connections message set
- Create customized landing pages
- Draft SMS copy
- Program landing pages and applications for prepopulated data
- Ensure seamless and immediate login
- Place trigger pixels on .edu to generate relevant immediate content for inquiry visitors
- Develop trigger stream programming to drive custom content

Omnichannel Deployment Management

- Drip-style inclusion of new inquiries and prospects
- Recurring name acquisition, including monthly new launches
- Channel synchronization and alignment
- Ongoing data processing and cleansing
- Inquiry and Application data capture
- CRM data return
- Proofreading of copy across channels
- QA testing for functionality and accuracy
- Response management

Lead and Yield Scoring

- Annual creation of customized decision tree model for likelihood to apply
- Annual creation of decision tree model for likelihood to enroll
- Behavioral data integration
- Weekly refresh
- Quintile output

Reporting

- Full-funnel year-over-year dashboards
- Real-time campaign performance data
- Filtering for counselors and lead scores
- Historical benchmark data
- First-source attribution tracking (prospect to deposit)

Global Insights

- Benchmarking against comparable institutions and market segments
- Generating insights on market trends and opportunities
- Campaign adjustments based on shifts in student and parent behaviors and preferences
- Optimization of campaign components and strategies based on in-cycle performance
- Email variation testing
- Channel innovation pilots for emerging social, digital, and real-world channels

80+

Strategic and coordinated recruitment marketing activities that we execute on behalf of our partners

SOU Onboarding Progress To-Date

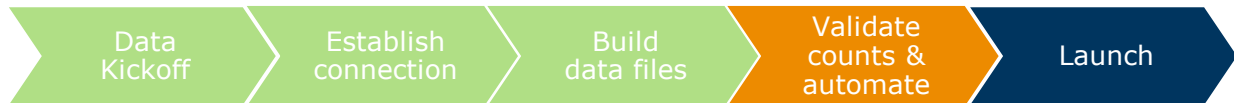


Planned Launch Timing – Early/Mid August

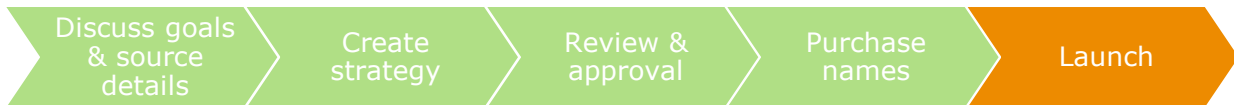
Creative



Data



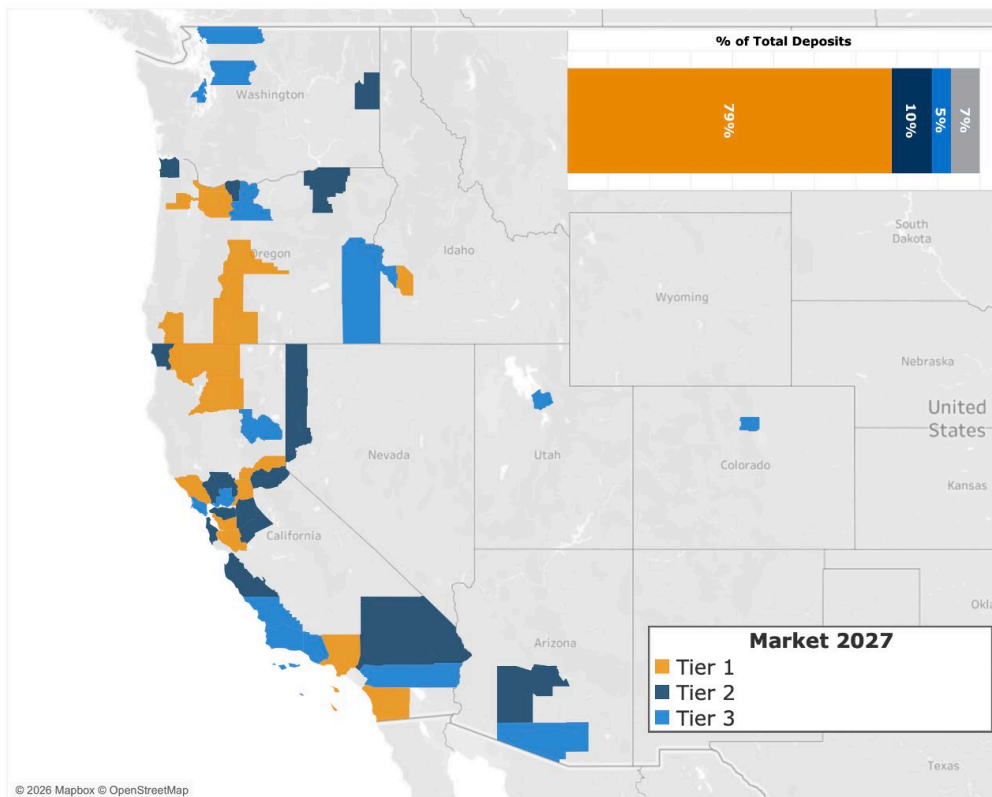
Audience Strategy



EAB has identified three markets for name buys, based on historic enrollment at SOU



65,000 records will be purchased from the markets below, for infusion into EAB campaigns





Students in each market will need to meet the following academic criteria

Note: based on historic student academic profile at SOU

List Source	Tier 1	Tier 2	Tier 3
SAT	750 – 1600 A+ to C, NR	750 – 1600 A+ to C, NR	750 – 1600 A+ to C, NR
PSAT	700 – 1520 A+ to C	700 – 1520 A+ to C	700 – 1520 A+ to C
AP	1 – 5	1 – 5	1 – 5
GPA Only	A+ to C+	A+ to C+	A+ to C+
Non-Assessment	A+ to C+	A+ to C+	A+ to C+
ACT	14 – 36 A+ to C	14 – 36 A+ to C	14 – 36 A+ to C
NRCCUA	A+ to C+	A+ to C+	A+ to C+



We are glad you are here!

The team at Southern Oregon University is excited to see that a student with your drive and interest in growth is considering applying to our regionally serving institution. When you apply, you will not have to write an essay, and test-score submission is optional.

[SOU APPLICATION](#)

[COMMON APP](#)

The Enrollment IQ dashboard will unlock next-level visibility into SOU's enrollment funnel



Enrollment Funnel Overview

ENTRY TERM
Fall 2024 Data as of 04/05/2024

Prospects

[Go to Top of Funnel Overview](#)

59,359

▲4.2%

LY YTD 56,956 LY Final 57,292



■ LY YTD ■ CY

Top 3 States

State	CY App Submit Rate	CY Name Buys	LY Name Buys (YTD)	YOY Change
Texas	15.4%	53,551	50,307	▲6.4%
Oklahoma	4.8%	1,073	1,267	▼15.3%
Florida	.3%	701	862	▼18.7%

Inquiries

[Go to Top of Funnel Overview](#)

9,484

▲25.4%

LY YTD 7,566 LY Final 7,932 CY App Submit Rate 89.9%



■ LY ■ CY

Inquiries

No data

Applicants

[Go to Applications Overview](#)

8,528

▲27.9%

LY YTD 6,668 LY Final 7,071 CY Completion Rate 75.6%



■ LY ■ CY

Complete Applications

CY 6,443 ▲56.5% LY YTD 4,118

Admits

[Go to Yield Overview](#)

Enrollment IQ is *full-funnel* analytics platform for first-time Fall Freshmen from Prospects through Net Deposits that brings disparate data sources together all in one place:

- Top Funnel Reporting
- Future Planning Views
- Year-to-Date Comparisons
- Consultant Access
- Goal Monitoring



Enrollment IQ includes four main sections, each providing insights at various stages of the enrollment funnel:

- Funnel Overview: Highlights at each funnel stage
- Top of Funnel: EAB Name Buys & Inquiries
- Applications: Submitted & Completed Applications
- Yield: Admits & Net Deposits

Enrollment Management Report

Enrollment Management Report



Zac Olson & Dr. Carrie Vath
June 17, 2026

Executive Report (Spring 2026)

Student Headcounts
Spring 2025 Week Ending 6/1/25 vs. Spring 2026 Week Ending 5/31/26
9 Weeks After Start of Term

	Spring 2025	Spring 2026	Change	% Change	Spring 2025 End of Term	Change	% Change
New Freshmen	16	13	-3	-18.8%	16	-3	-18.8%
New Transfers	43	29	-14	-32.6%	43	-14	-32.6%
New PostBacs/Graduates	53	37	-16	-30.2%	53	-16	-30.2%
Subtotal - New Students	112	79	-33	-29.5%	112	-33	-29.5%
Continuing Undergraduate Students	2,322	2,210	-112	-4.8%	2,322	-112	-4.8%
Continuing Graduate Students	404	402	-2	-0.5%	404	-2	-0.5%
Returning Undergraduate Students	73	54	-19	-26.0%	73	-19	-26.0%
Returning Graduate Students	25	22	-3	-12.0%	25	-3	-12.0%
Non-Admitted Students	1,439	1,686	247	17.2%	1,456	230	15.8%
Grand Total - Headcount	4,375	4,453	78	1.8%	4,392	61	1.4%
Grand Total - FTE	2,825	2,753	-72	-2.5%	2,845	-92	-3.2%
Resident	3,356	3,516	160	4.8%	3,369	147	4.4%
Non-resident	1,019	937	-82	-8.0%	1,023	-86	-8.4%
International	43	35	-8	-18.6%	43	-8	-18.6%
American Indian/Alaskan Native	50	49	-1	-2.0%	50	-1	-2.0%
Asian	60	52	-8	-13.3%	61	-9	-14.8%
Black/African American	59	49	-10	-16.9%	59	-10	-16.9%
Hispanic/Latino	417	363	-54	-12.9%	419	-56	-13.4%
Pacific Islander	23	23	-	0.0%	23	-	0.0%
North African, Middle eastern, Other	28	34	6	21.4%	28	6	21.4%
Two or More Races	316	284	-32	-10.1%	315	-31	-9.8%
Subtotal - Students of Color	953	854	-99	-10.4%	955	-101	-10.6%
White	1,753	1,557	-196	-11.2%	1,756	-199	-11.3%
Unknown	1,626	2,007	381	23.4%	1,638	369	22.5%
Alaska	28	26	-2	-7.1%	28	-2	-7.1%
California	599	562	-37	-6.2%	600	-38	-6.3%
Hawaii	31	27	-4	-12.9%	31	-4	-12.9%
Idaho	18	29	11	61.1%	18	11	61.1%
Washington	113	97	-16	-14.2%	116	-19	-16.4%
All Other States	185	176	-9	-4.9%	185	-9	-4.9%



Undergraduate Course SCH by Department
Spring 2025 Week Ending 6/1/25 vs. Spring 2026 Week Ending 5/31/26
9 Weeks After Start of Term

Department	Spring 2025	Spring 2026	Change	% Change
Art and Art History	1,541	1,559	18	1.2%
Athletics	365	261	-104	-28.5%
Biology	1,602	1,660	58	3.6%
Business Administration	3,730	3,507	-223	-6.0%
Chemistry & Physics	1,129	1,003	-126	-11.2%
Communication, Media & Cinema	2,475	2,433	-42	-1.7%
Computer Science	868	832	-36	-4.1%
Creative Writing	421	374	-47	-11.2%
Criminology & Criminal Justice	1,473	1,662	189	12.8%
Economics	712	800	88	12.4%
Education	1,888	1,829	-59	-3.1%
Emerging Media & Digital Arts	912	820	-92	-10.1%
English Studies	1,307	1,164	-143	-10.9%
Env. Science, Policy, & Sust	940	789	-151	-16.1%
Gend,Sexuality,Women's Studies	252	338	86	34.1%
Health & Exercise Science	1,731	1,612	-119	-6.9%
Healthcare Administration	44	12	-32	-72.7%
History	1,036	888	-148	-14.3%
Honors College	322	339	17	5.3%

Department	Spring 2025	Spring 2026	Change	% Change
Innovation and Leadership	60	24	-36	-60.0%
International Studies	24	4	-20	-83.3%
Library & Information Science	-	84	84	
Mathematics	2,762	2,944	182	6.6%
Military Science	77	75	-2	-2.6%
Music	958	1,007	49	5.1%
Native American Studies	140	120	-20	-14.3%
Outdoor Adventure Leadership	368	379	11	3.0%
Philosophy	576	448	-128	-22.2%
Power & Politics	205	84	-121	-59.0%
Psychology	3,245	2,890	-355	-10.9%
Sociology & Anthropology	862	508	-354	-41.1%
Spanish & American Sign Lang.	396	404	8	2.0%
Success At Southern	8	8	-	0.0%
Theatre	2,002	2,063	61	3.0%
UGS - WR 122/Study Abroad/Bridge	2,459	2,370	-89	-3.6%
University Seminar	-	-	-	
All Undergraduate SCH	36,890	35,294	-1596	-4.3%

Graduate Course SCH by Department
Spring 2025 Week Ending 6/1/25 vs. Spring 2026 Week Ending 5/31/26
9 Weeks After Start of Term

Department	Spring 2025	Spring 2026	Change	% Change
Art and Art History	-	-	-	
Biology	-	-	-	
Business Administration	308	400	92	29.9%
Chemistry	-	-	-	
Communication, Media & Cinema	16	16	-	0.0%
Computer Science	-	-	-	
Creative Writing	-	-	-	
Criminology & Criminal Justice	-	-	-	
Economics	-	-	-	
Education	1,539	1,398	-141	-9.2%
Emerging Media & Digital Arts	-	-	-	
English Studies	20	-	-20	-100.0%
Env. Science, Policy, & Sust	11	8	-3	-27.3%
Gen,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	767	610	-157	-20.5%
Masters in Interdisc. Studies	-	-	0	
Master in Management	-	-	0	
Master in Mental Health Cnslng	617	728	111	
Mathematics	4	-	-4	-100.0%
Military Science	-	-	0	
Music	-	-	0	
Native American Studies	-	-	0	
Outdoor Adventure Leadership	102	75	-27	-26.5%
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	28	7	33.3%
All Graduate SCH	3,409	3,279	-130	-3.8%

SCH by Student Level Within Tuition Category
Spring 2025 Week Ending 6/1/25 vs. Spring 2026 Week Ending 5/31/26
9 Weeks After Start of Term

Tuition Category	Spring 2025	Spring 2026	Change	% Change
UG WUE	7,070	5,890	-1,180	-16.7%
UG Resident	15,018	14,083	-935	-6.2%
UG Jack/Jo Pledge	346	223	-123	-35.5%
UG Non-resident	300	247	-53	-17.7%
UG Online	9,254	9,561	307	3.3%
Subtotal - Undergraduates	31,988	30,004	-1,984	-6.2%
GR Resident	686	787	101	14.7%
GR Non-resident	149	144	-5	-3.4%
GR AP MBA Online	771	689	-82	-10.6%
GR AP ED Online	673	629	-44	-6.5%
GR Online	81	80	-1	-1.2%
GR Education Differential	852	737	-115	-13.5%
Subtotal - Graduates	3,212	3,066	-146	-4.5%
Subtotal - Core Revenue SCH	35,200	33,070	-2,130	-6.1%
Staff Rates	237	356	119	50.2%
Waived Tuition	194	145	-49	-25.3%
Course Based Tuition	203	194	-9	-4.4%
Advanced Southern Credit	4,438	4,716	278	6.3%
Early Entry HS	27	92	65	240.7%
OLLI	999	1,529	530	53.1%
Staff Training & Development	-	-	-	
Subtotal - Supplemental Revenue SCH	6,098	7,032	934	15.3%
Grand Total - SCH	41,298	40,102	-1,196	-2.9%

Top Majors Spring 2026 (as of 6/4/2026)

UG Major		Count
Business Administration	380	380
Education	169	169
Psychology	266	266
Theatre	161	161
Communication, Media & Cinema	143	143
Health & Exercise Science	142	142
Biology	125	125
Criminology & Criminal Justice	110	110
Emerging Media + Design	78	78
Environmental Science, Policy & Sustainability	66	66
Art & Art History	63	63
English Studies	60	60

GR Major	Count
Education	194
Business Administration	188
Clinical Mental Health Counseling	54
Spanish & American Sign Language	28
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%

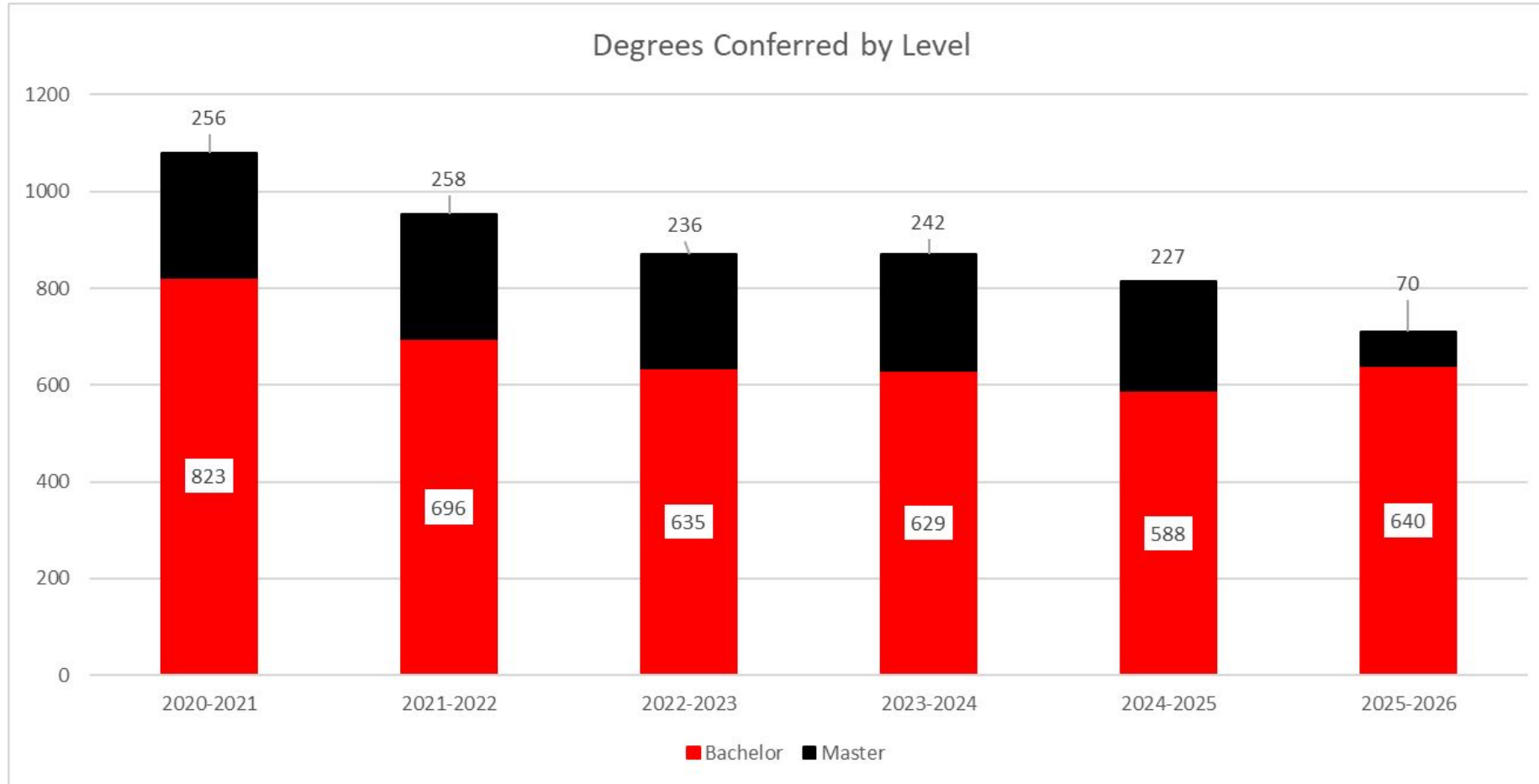
Fall to Spring Persistence Rate		All UG	
Fall 2025		86.5%	82.6%
Fall 2024		88.1%	85.9%
Fall 2023		87.4%	85.7%
Fall 2022		86.9%	84.2%
Fall 2021		83.6%	82.7%
Fall 2020		84.7%	80.9%

*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 25 to Spring 26 refers to the % of Fall 2025 students who returned for Spring 2026 or graduated.

Degree Completions (as of 6/4/2026)



Spring-to-Fall Persistence (as of 6/4/2026)

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 6/4/2026)

Spring 2026 Demographics

Student Class	Count	%
Freshman (<45 credits)	302	11.06%
Sophomore (45-90 credits)	414	15.16%
Junior (90-134 credits)	606	22.19%
Senior (135+ credits)	925	33.87%
Graduate (Masters)	455	16.66%
Post-Baccalaureate Non-Grad	29	1.06%

Ethnic Groups	Count	%
Asian	56	2.05%
Black	42	1.54%
Hispanic	346	12.67%
Middle Eastern	29	1.06%
Multiple	271	9.92%
Native American	48	1.76%
Pacific Islander	23	0.84%
Unknown or Other	527	19.30%
White	1,389	50.86%

Subpopulation	Count	%
Pell Recipient Students	905	33.14%
Rural Students	629	23.03%
First Generation Students	663	24.28%
Students with Veteran Status	167	6.11%
Underrepresented Minority Students	574	21.02%
Students with Disability	260	9.52%

FT/PT Status	Count	%
Full-time	2,079	76.13%
Part-time	652	23.87%

Gender	Count	%
F	1,425	52.18%
M	859	31.45%
N*	447	16.37%

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

Residency	Count	%
Out of State	833	30.50%
In State	1,898	69.50%

Age Group	Count	%
0-18	1	0.04%
18-20	698	25.04%
21-24	1,112	39.89%
25-29	316	11.33%
30-39	342	12.27%
40-49	196	7.03%
50+	123	4.41%

Questions?



SOU Vitality Plan

SOU Vitality Plan

Vitality Plan Executive Summary

Southern Oregon University's Vitality Plan outlines an academic and financial transformation. It redefines the university as one that is uniquely tied to the region and embraces the changing higher education landscape. It does so in four fundamental ways:

1. The plan implements a total **re-engineering of institutional identity**, pivoting toward a hyper-local, place-based pedagogical distinctiveness.
2. The plan incorporates a **\$20 million overall financial overhaul** through a combination of cost savings and revenue generation. Unfortunately, this will affect 65.62 FTE positions (22.67 faculty, 22.50 classified staff, and 20.45 unclassified staff).
3. The framework reduces middle management positions, downsizes the institutional administrative footprint, and **aspires to broader partnerships** with educational institutions and community entities.
4. The model requires auxiliary units to **move toward self-sufficiency**, stripping away historical General Fund dependencies from external-facing or non-academic programs and transitioning them to philanthropic or collaborative self-support structures.

DRAFT MISSION

Southern Oregon University educates students for resilient, meaningful lives by making the Rogue Valley our classroom, mentorship our method, and practical and experiential work our curriculum.

The cornerstone of this new identity is a revised mission that codifies the Rogue Valley as the literal pedagogical classroom, structural mentorship as the delivery method, and practical, experiential portfolio work as the mandatory curriculum.

DRAFT VISION

Southern Oregon University will be the country's defining model of what a regional public university can be: small by choice, distinctive by design, financially resilient, and rooted in place, where every student graduates with real work, real mentors, and human capacities that no machine can replicate.

This proposed new vision recognizes that SOU needs to be mindful of its unique contributions and laser focused on its value proposition for current and prospective students. The SOU Vitality Plan is a bridge to the development of that new institution.



BACKGROUND AND CONTEXT

SOU has endured at least four rounds of stabilization efforts, dating back to 2013. More recently, SOU leaders implemented SOU FORWARD in 2023 and the Resiliency Plan in 2025, along with declaration of financial exigency, collectively eliminating 151.83 FTE positions, including faculty, unclassified staff, and classified staff lines. Following an emergency cash deficit in early 2026 that required \$15 million in gap funding to maintain solvency through the conclusion of fiscal year 2027, a stark assessment by consulting firm Deloitte warned that SOU must achieve \$20 million (inclusive of the cuts made in the Resiliency Plan) in ongoing structural changes or face closure.

LOOKING FORWARD

The Vitality Plan will serve as a roadmap to achieve fiscal solvency by the summer of 2027 through a profound restructuring of SOU's core identity. Rather than managing a smaller, diminished version of a generic regional university, the plan explicitly pivots SOU toward becoming a highly distinctive, place-based institution.

Additionally, the Vitality Plan introduces several high-level administrative adjustments to compress the university's non-instructional footprint. The most significant structural change occurs within Academic Affairs where the university replaces its multiple-dean model by transitioning to a flat governance framework with a single Dean of Faculty who reports directly to the Provost.

To resolve critical operational data deficiencies, the university is merging several of its business services functions into a centralized Business Intelligence Office. This action consolidates financial data analysis, institutional research, and Workday enterprise systems management under a single command. Similarly, Information Technology will be compressed under a Chief Information Officer/Chief Information Security Officer (CIO/CISO). Finally, within Student Affairs, the university is dismantling the decentralized support matrix that previously embedded individual Student Success Coordinators (SSCs) within isolated academic schools.

To remain financially and structurally viable, Southern Oregon University also will invest and reinvest in critical operational, leadership, and infrastructure areas. This includes reinvesting in the Development and Alumni Relations programs once the campus' inaugural \$100 million comprehensive campaign concludes in roughly three years. The university also will remain committed to investing in marketing to maintain and grow enrollment. Finally, SOU will continue to explore shared-service models with regional university partners while pivoting its curriculum toward an interconnected, place-based Living Laboratory pedagogical model.

Together, these changes position SOU to emerge as a more focused, future-looking, resilient university capable of serving students and the region for the long-term.

Data Integrity and Access

SOU Annotated Ledger

Board of Trustees, June 16, 2026. Daniel DeFreez, Associate Professor of Computer Science.

The SOU Annotated Ledger is a web view of SOU's own data, built so faculty and anyone else at SOU can read it and check it. It pulls together the Banner and Workday financial ledgers, joined across SOU's mid-window migration, along with enrollment and credit hours by program, salaries, vendors, restricted funds, the course catalog, and the state's funding records. From those it builds a page for every academic unit and support office, plus a wide set of plots that cut across the whole institution. The numbers are explained, with the formula behind each one shown.

It began as a rebuild of Deloitte's table of department operating margins, then grew as people put their own questions to it. How have a program's expenses moved over time? Where do student wages go? Where does restricted money go, an area Deloitte's review barely touched? Each is a page or a plot, with the figures explained.

The state funding formula is one place the tool shows its value. Oregon funds the university through the Public University Support Fund (PUSF), a formula tangled enough that the state's own published worked example does not quite agree with itself. The tool re-implements it from the published rule, which lets a program's state funding be traced and tested, down to what reclassifying a single course would change.

This tool does not correct the underlying books; it explains those numbers to everyone else, as correcting the books is the finance team's ongoing work. The working groups have had access since May, and questions and corrections are welcome at any time.

It is in front of the board to tell the story of the tool, how it came together over recent months, and that story carries one suggestion. The work so far has depended on one person's time and a single data export, so for the picture to stay current as the Plan is carried out, it would help to give it a defined home and a regular data feed, roughly the access Deloitte had, under a written understanding of how the data is used.

BOARD OF TRUSTEES / JUNE 16, 2026

The SOU Annotated Ledger

*A web view of SOU's Banner and Workday
financial exports.*

Daniel DeFreez, PhD

Associate Professor of Computer Science



“No numbers without stories;
no stories without numbers.”

— Jackie Carter *Significance*, 2025

— Dennis Slattery

What the tool is, and what it is not

A web view of SOU's own financial exports, with every figure traceable to source.

- One page per academic unit and support office, plus cross-cutting Across SOU plots.
- Click any figure to see its formula and the ledger rows it sums.

It spans finance and academics: per-program contribution, salaries, vendors, and restricted money, alongside enrollment, headcount, and credit hours.

WHAT IT IS NOT

Not a fix for the underlying data. Correcting the books is ongoing work, and the finance team's job.

This tool explains those numbers to everyone else, and re-implements the PUSF funding formula, which is genuinely tricky.

Where the data comes from

SOU moved from Banner to Workday partway through the window. The tool joins both into one ledger, then rolls it up to the institution's E&G operating account.

Each figure is a sum of Workday cost-center rows, and ties to the per-unit table on the units page to the dollar.

FY25 E&G BALANCE

E&G revenue, academic units	+\$70,511,296
<hr/>	
E&G expense, academic units (direct)	-\$30,194,252
<hr/>	
E&G expense, rest of SOU	-\$43,973,807
<hr/>	
Operating unbalance	-\$3,656,763

FY25, from SOU's Workday operating ledger.

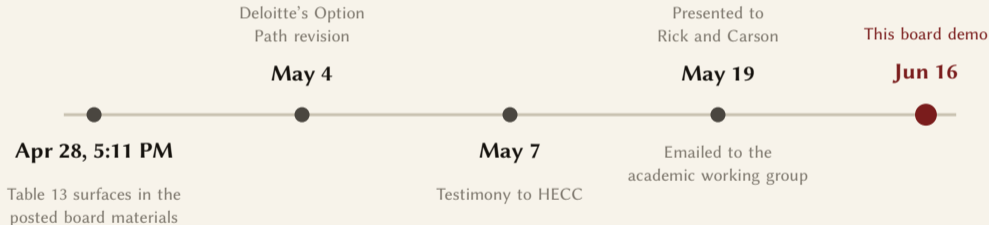
A new Table 13

A per-program contribution table where every number opens up: each allocation choice is explicit, with the formula and ledger rows behind every cell.

Unit	SCH	WSCH	MAJORS	REVENUE	COST (DIRECT)	DEPARTMENT CONTRIBUTION	PROGRAM CONTRIBUTION	DEPT CONTRIBUTION / SCH	PROGRAM CONTRIBUTION / SCH	DEPT CONTRIBUTION / ONGOING FTE
Business Administration	15,227	17,668	696	\$10,155,399	\$3,305,861	\$6,849,538	\$6,849,538	+\$449	+\$449	\$535,958
Education	11,877	21,890	482	\$8,536,504	\$3,579,770	\$4,956,734	\$4,905,788	+\$417	+\$413	\$413,061
Communication, Media & Cinema	8,057	9,561	164	\$4,491,776	\$1,215,630	\$3,276,146	\$3,034,771	+\$406	+\$376	\$421,098
Theatre	6,639	5,993	187	\$4,443,876	\$1,892,083	\$2,551,793	\$2,352,899	+\$384	+\$354	\$283,533
Psychology	9,571	9,003	355	\$4,438,187	\$1,483,380	\$2,954,806	\$2,819,390	+\$308	+\$294	\$295,481
Biology	4,798	5,796	168	\$3,016,582	\$971,846	\$2,044,736	\$1,782,964	+\$426	+\$371	\$340,789
Health & Exercise Science	5,484	5,726	184	\$2,826,461	\$783,607	\$2,042,854	\$2,019,331	+\$372	+\$368	\$408,571

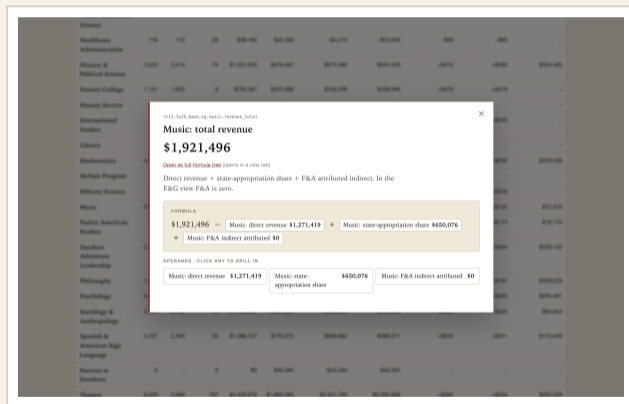
Seven units shown here for space; the web app has all of them, with every cell's derivation.

From the April 28 table to this demo



Through mid-May Rick raised the tool with the working groups; on June 1 he proposed today's demo.

What does a program contribute, and from where?



Music total revenue, opened from the contribution table.

Every academic unit has a page. Open a figure and it shows as a sum of named parts.

Each part is a link, down to the individual ledger rows that produced it.

RQ: Did Physics previously receive ETIC money?

Hala Schepmann (Chemistry and Physics) asked what happened to the Physics ETIC money, a stream the curated views never show.

🔍 ETIC physics

WHAT THE SEARCH RETURNS

\$80K to \$100K a year

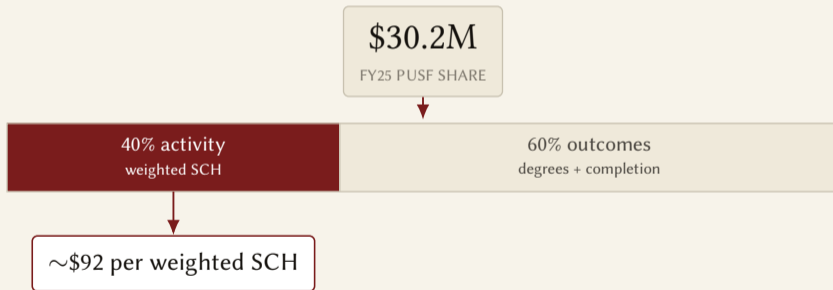
to SOU Physics, under ETIC

Until ETIC was dissolved in the 2015 OUS breakup. The stream moved to the new HECC, renamed ETSF, and the Physics allocation went to zero. FY16 is the last year it shows.

A six-figure stream that vanished in a state reorganization, recovered from years of Banner data. (A smaller bookstore lab-manual trail solves the same way.)

How the state funding formula pays SOU

Oregon funds SOU through the Public University Support Fund.



Activity dollars track weighted SCH: credit hours times a CIP cost weight.

RQ: What does changing a CIP code do?

Change a course's CIP code, change its cost weight, change its activity dollars. Example: HE 331 Environmental Health.



This is a question the academic working group raised and wanted answered. The tool answers it. Whether a relabel is worth making is theirs to weigh, not the tool's to recommend.

Checking the formula

- A 0.6 multiplier is applied to every graduate cost weight. It appears in HECC's worked examples but is written into none of its published rules.
- The Junior/Senior Psychology row is computed with the Freshman/Sophomore weight.

This formula is tangled enough that its one published worked example does not quite agree with itself.

HECC TABLE H, HYPOTHETICAL CALCULATION

LEVEL	DISCIPLINE	SCH	WEIGHT	WT. HRS
Fr/Soph	Engineering	5,000	1.98	9,900
Jr/Sr	Psychology	2,500	0.92	2,300
Master's	Education	2,250	1.38	3,105
Doctoral	History	1,100	2.96	3,256
Totals		10,850		18,561

0.92 is the Freshman/Sophomore Psychology weight, in a row labeled Junior/Senior. 1.38 is the graduate weight after the 0.6 multiplier (2.30×0.6).

Scenario planning is the top request

By far the most common request is scenario planning: if a program is cut or merged, what happens to its revenue, its cost, and the state allocation that follows enrollment?

It is the natural next step for a tool that already traces every figure to source, and it is a real amount of work to do well.

WHY IT IS NOT IN THE TOOL YET

A wrong scenario does not look wrong: it returns a clean number that people then act on.

It is also hardest right now: with the institution in flux, there is no settled picture of which programs and people remain, and a projection is only as good as that assumption.

A structure to keep this useful

Informally, one suggestion: a defined place and an ongoing data feed, so the picture stays current through implementation.

OFFICIAL STANDING

An institutional function,
not a side project.

ONGOING DATA ACCESS

A regular feed, roughly
the consultant's scope,
defined later.

AGREEMENT ON USE

What is accessed, how it
is secured, how it is used.

IN SHORT

SOU's own numbers,
with helpful, continuously
improving explanations.

Finance was the focus today; the same tool also covers enrollment, headcount, and credit hours by program, salaries, vendors, and restricted money. Questions and corrections welcome any time.

CONTACT

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Discussion of Plan



PATH TO FISCAL SUSTAINABILITY

The Vitality Plan

June 15, 2026

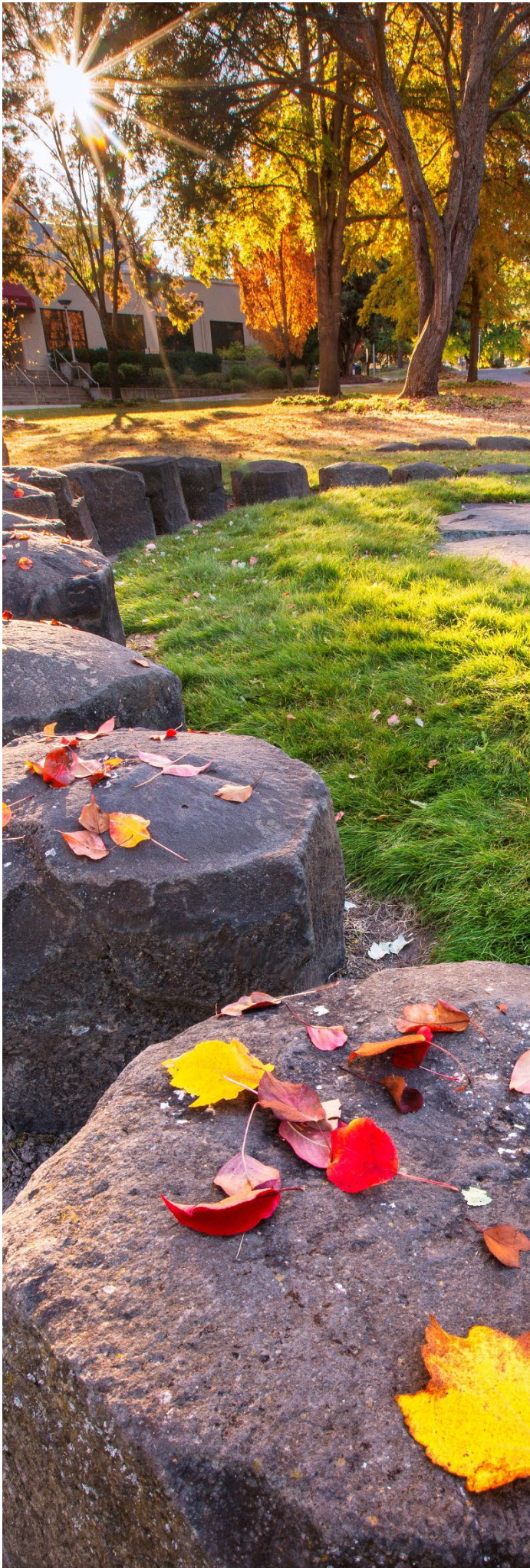


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Introduction

Southern Oregon University sits at a crossroads. Our students, faculty, staff, and community are committed to the long-term health and viability of the university we all value. This moment calls for a bold transformation, one that honors our legacy but is willing to forge ahead in fundamentally different ways. The Vitality Plan provides a roadmap for a financially stable SOU and an innovative vision that will allow the university to thrive.

The landscape in higher education is shifting in a seismic way. Institutions, particularly public regional universities, are contending with a myriad of challenges, such as demographic shifts, changes in student behavior, market forces, and availability of alternative options.

Background And Context

Today's financial crisis at Southern Oregon University (SOU) is not a sudden product of current economic shifts, but rather the impact of an outdated fiscal model. Historically, public higher education institutions across the State of Oregon relied upon a stable, predictable funding matrix composed of a major share of state legislative appropriations complemented by student tuition revenues.

In the latter decades of the twentieth century, this funding paradigm maintained a stable structural equilibrium, wherein state allocations accounted for approximately two-thirds of the university's operational cost base, leaving student tuition to fund the remaining one-third. However, as state-level fiscal priorities shifted, this ratio underwent a dramatic and permanent inversion.

By the early decades of the twenty-first century, the funding matrix flipped entirely, shifting two-thirds of the operational burden onto students and their families through tuition and fees, while state appropriations contracted to cover just one-third of the institutional budget. This inversion placed an unsustainable financial burden on the student consumer base and exposed SOU to intense financial vulnerability whenever student enrollment patterns deviated from optimistic projections.

A DECADE OF FISCAL STABILIZATION EFFORTS

In early 2026, SOU arrived at operational and financial crossroads due to a compounding mixture of long-term structural imbalances, shifting state funding priorities, and a steep enrollment decline that materialized over the last decade. This institutional crisis, while accelerated by current economic headwinds, reflects weaknesses that predate the establishment of the university's independent governing board following the dissolution of the Oregon University System in 2015.

In November 2013, the university administration announced a formal state of retrenchment, a contractual term within the university's collective bargaining agreement with the Associated Professors of Southern Oregon University (APSOU), which took effect during the 2014-15 academic year. The retrenchment strategy sought to rebuild an exhausted fund balance, stabilize enrollment, improve student retention rates, increase average course section sizes, and eliminate low-enrolled courses while instilling strict accountability metrics regarding faculty workloads.

Recognizing these vulnerabilities, the State Board of Higher Education and the Governor established explicit conditions in May 2014 before granting SOU an independent Board of Trustees in 2015. State policymakers observed that SOU's fiscal weakness was a persistent, structural condition rather than a transitory phase. Although a subsequent comprehensive evaluation in 2018 noted positive trend lines and short-term reserves on hand, the university has struggled to maintain fiscally healthy reserves.

Compounding this revenue inversion was a steep drop in enrollment. SOU's full-time equivalent enrollment declined from 4,108 students in 2015 to 3,209 in 2024, representing an overall 22% reduction in full-time student enrollment in a decade.

Concurrently, institutional spending grew at an average annual rate of 4.9%, driven heavily by escalating costs outside the university's direct control, such as Public Employees Retirement System (PERS) contribution rates and Public Employees' Benefit Board (PEBB) healthcare adjustments. This stood in sharp contrast to core institutional revenues, which grew at an average annual rate of less than 1%.

THE SOU FORWARD REALIGNMENT STRATEGY (2023-2024)

To resolve the expanding structural deficit, university academic and administrative leaders engineered SOU FORWARD, a comprehensive four-plank realignment strategy designed to stabilize operations by matching institutional costs with realistic revenues. The strategy combined immediate, aggressive cost management with long-term initiatives in grant generation, an expansion of philanthropic contributions, and revenue diversification through the implementation of several entrepreneurial ventures.

The primary cost management plank required sweeping, painful reductions that fundamentally altered the academic and administrative landscape of the campus. Recognizing that 85% of the university's operating costs represented direct investments in personnel, the cost management plan recommended a major downscaling of the university workforce, eliminating 81.83 FTE positions, which translated to a 13% reduction in the university's total workforce.

This major workforce downscaling was achieved through a combination of leaving open vacancies unfilled, securing voluntary reductions, processing retirements, and enacting direct layoffs. Position reductions were spread across all primary employment categories, including 27.03 FTE positions from faculty lines, 24.75 from unclassified administrative staff, and 30.05 from classified personnel.

THE RESILIENCY PLAN AND THE DECLARATION OF EXIGENCY (2025)

Just two years after implementing the initial realignment strategy, SOU continued to face challenging financial headwinds. While the diversification planks in SOU FORWARD generated positive early outcomes—including \$22 million in total grant support, a 125% increase in philanthropic giving, and nearly \$6 million dollars in targeted solar grants—the university's core revenue streams continued to deteriorate.

During the 2025 legislative session, the Oregon Legislature approved a biennial higher education budget funded strictly at the Current Service Level. This allocation operated as a baseline-cuts budget, because it failed to keep pace with state-mandated increases in healthcare and retirement benefit expenditures.

This funding gap pushed SOU's existing academic and administrative infrastructure out of balance for an institution whose functional enrollment had dropped significantly.

Faced with a projected baseline annual operating cost of \$71 million and an imminent cash shortage, the SOU Governing Board of Trustees directed the administration in June 2025 to identify \$5 million in immediate budget reductions. Recognizing that minor adjustments could no longer fix the structural imbalance, university leadership determined that SOU had to transform into a smaller, more resilient enterprise where recurring revenues explicitly exceeded costs.

To execute this transformation legally and structurally, the University President took the historic step of declaring a formal state of financial exigency on August 1, 2025. Financial exigency, defined as an imminent and severe fiscal crisis threatening an institution's survival, provided a cooperative mechanism within the university's collective bargaining agreement with APSOU to re-engineer academic and administrative operations.

The Resiliency Plan targeted a sustainable operating framework centered around an annual General Fund budget baseline of \$60 million, selecting programmatic offerings based on regional economic demands, workforce priorities, and student graduation patterns. To hit this target, the Resiliency Plan mandated a second major workforce contraction, eliminating an additional 70 FTE positions across campus. This second reduction wave cut 28 faculty lines, 28 unclassified administrative roles, and 14 classified worker positions.

When layered on top of the initial SOU FORWARD reductions, the university cut a cumulative total of 151.83 FTE positions in under three years; these reductions were composed of 36% faculty, 34% unclassified staff, and 30% classified workers.

CUMULATIVE WORKFORCE CONTRACTIONS (SOU FORWARD + RESILIENCY PLAN)

Faculty reductions: 27.03 FTE (SOU FORWARD) + 28.00 FTE (Resiliency) = **55.03 FTE**

Unclassified staff reductions: 24.75 FTE (SOU FORWARD) + 28.00 FTE (Resiliency) = **52.75 FTE**

Classified staff reductions: 30.05 FTE (SOU FORWARD) + 14.00 FTE (Resiliency) = **44.05 FTE**

Total Position Losses: 81.83 FTE (SOU FORWARD) + 70.00 FTE (Resiliency) = **151.83 FTE**

The academic core was aggressively reconfigured under the Resiliency Plan, reducing the university's curriculum to 30 majors, 19 minors, and a streamlined selection of graduate degrees. Some programs flagged for elimination in early drafts were conditionally preserved, provided they implemented radical efficiency overhauls.

THE INFLECTION POINT: LIQUIDITY DEFICITS AND HB 5204 (2026)

Despite the aggressive personnel and program cuts mandated under SOU FORWARD and the Resiliency Plan, SOU's operational stability suffered a severe infrastructure disruption in early 2026. Complications

resulted from the transition to the university's new financial resource enterprise software platform, Workday, which had been approved for implementation by the SOU Governing Board in 2022.

The lack of data visibility within Workday quickly collided with an emergency cash shortage in early 2026 when the university's updated cash flow modeling revealed that while baseline budget sheets showed a paper stabilization, the institution's actual cash receipts and expense trajectories would breach mandatory minimum cash threshold by May 2026. Further, the internal analysis revealed that SOU's underlying expense trajectory, combined with the structural timing of tuition receipts, projected that the university would be unable to meet its financial obligations prior to the end of the fiscal year.

In direct response to this threat, university leaders, Board of Trustees members, and the Higher Education Coordinating Commission (HECC) collaborated on a legislative plan to approach the Oregon Legislature for gap funding during its 2026 regular session. House Bill 5204 established a \$15 million General Fund Special Purpose Appropriation allocated to the Emergency Board, designed to function as emergency short-term solvency funding for SOU's fiscal year 2027 operations.

To verify SOU's emergency funding request, a comprehensive review team, which included the chief financial officers from the University of Oregon, Oregon State University, and Oregon Institute of Technology, corroborated SOU's findings that its cash survival remained dependent on the exact timing of external state subsidies rather than positive operating margins. They also noted that the one-time revenues (such as pandemic relief funds) had masked the true scale of the university's structural cash deficit.

A subsequent assessment of cash flow projections completed by CliftonLarsonAllen in April 2026 confirmed constrained liquidity for SOU. The sensitivity models proved that SOU's cash line was vulnerable to deviations in student enrollment and fee collectability.

THE DELOITTE PLAN

In May 2026, national consulting firm Deloitte, which had been hired by the HECC, proposed a path toward fiscal sustainability, even if sustainability meant merging with another institution or becoming a smaller yet independent university. Deloitte's consultants issued a stark warning: the university must radically restructure or risk winding down its operations entirely. The firm's resulting "Option Path" was built around achieving roughly \$20 million in annual savings to stave off insolvency by the summer of 2027.

At the heart of the Deloitte proposal was a deep, painful reshaping of the university's academic identity, aiming for about \$8 million in cuts within Academic Affairs alone. To stabilize the budget, the plan recommended suspending or eliminating several long-standing programs and consolidating or heavily reconfiguring others. Under this lean model, the university would enforce a target average class size of 22 students and subject enrollment numbers to strict quarterly reviews. Deloitte's Option Path shifted resources away from the traditional liberal arts, pivoting hard toward high-demand, career-focused fields like Business, Education, and Health.

Beyond the classroom, the proposal suggested outsourcing certain administrative functions and leasing out campus buildings to generate fresh revenue. To allow time to implement these sweeping changes,

the plan assumed a one-time, \$15 million emergency funding boost split across fiscal years 2026 and 2027, with a hard deadline for full transition by June 2027.

The publication of the report immediately sparked intense debate across the campus and the surrounding region. Faculty and staff voiced sharp opposition, questioning the validity of the data used by the consultants and arguing that the cuts penetrated too deeply into the soul of the institution. Recognizing the community's anxiety, SOU's leaders and the Board of Trustees clarified that they viewed the Deloitte report as a resource rather than a finalized blueprint. Ultimately, SOU administrative leaders were directed to use the report to craft their own sustainability strategy, attempting to balance financial survival with SOU's core educational mission.

REIMAGINING SOU FOR THE FUTURE (JUNE 2026)

After four and a half years of crisis management, highlighted by the SOU Forward and Resiliency plans, Board of Trustees members, administrators, and campus leaders all agreed that this new effort needed to solve the fiscal structural imbalance that had been building for decades. Campus stakeholders all agreed that the morale and future success of the institution depended upon a comprehensive, thorough, and durable solution.

On Friday, May 8, 2026, the Board of Trustees directed university leaders to use Deloitte's Option Path framework (which recommended a \$20 million structural change) as a resource to construct the SOU Vitality Plan, a path toward achieving fiscal sustainability by the summer of 2027. This figure, determined by Deloitte, would solve the structural imbalance and provide a fiscal cushion to help regenerate reserves and protect the institution from unforeseen circumstances. Campus stakeholders also understood that given a national landscape where colleges and universities are now closing or merging at a rate of almost one per week, this effort would not be simply a fix. It would be necessary for the survival of the institution.

Guiding Principles

Any transformational process, particularly at an institution as complex as a public university, involves making choices that are incredibly challenging and for which there are no easy answers. Thus, a process like this, which impacts the livelihoods of students, faculty, staff, and the broader community, requires a set of guiding principles to navigate the uncertainty and gravity of the effort. In 2023, as work began on the project that ultimately became SOU FORWARD, university leaders developed a set of principles based upon the institution's core values as a means to guide our behavior throughout that process. We shared these principles with our campus community each time we met to review progress toward that recommendation. The guiding principles have led us ever since and also informed the work on the SOU Resiliency Plan and the current SOU Vitality Plan.

These principles are:

- Integrity
- Primacy of students and the university
- Transparency
- Compassion
- Long-term vision
- Belonging and inclusion
- Universality
- Humility
- Unity

After the challenges of the SOU Resiliency Plan, much of which had to be developed over the summer of 2025, transparency quickly became one of the most important focus areas. Given a very short timeline to develop the Vitality Plan (May 8 until June 15, 2026), the central challenge was in trying to ensure that all campus stakeholders had a voice in the development of the plan, and that there would be a genuine respect for all of the contributions put forward.

Strategy and Approach

In any strategic endeavor, we continue to assert that there are two indispensable questions that must be addressed:

1. What is our current environment (the strategic context within which we are operating)?
2. How do we make ourselves adaptable to uncertainty?

As previous work has illustrated, the environment is shaped by our fiscal challenges, to be sure, but also by the contracts with our union partners, the perspectives of shared governance leaders, the myriad of opinions from community partners, the expectations of state and local governments, and more. The uncertainty is rooted in our inability to determine (with precision) future trends in state funding, enrollment, retention, and so forth. Thus, the plan needed to minimize the impact to the student experience, explore strategic savings versus strategic costs, respect the contracts that we have with our APSOU and Service Employees International Union (SEIU) partners, and prepare for the sea change happening in higher education around the state and across the country.

Immediately after the May 8 board decision, the university President assembled the Transformation Advisory Committee. This consultative group was composed of student, faculty, and staff leaders (coincidentally also representing the leadership of all three shared governance entities and both union partners) as well as two members from the Board of Trustees. This group provided strategic guidance that helped to inform this plan.

In an attempt to organize and solicit inputs and recommendations from campus stakeholders, the President sought volunteers to populate two work groups, one focused on the university's future academic portfolio and the other focused on the administrative footprint. The institution's dean of students facilitated similar dialogues with volunteers from the student body. The outputs and recommendations from all of these groups were shared with the campus community on a public website. Additionally, community stakeholders and any other on-campus contributors were invited to submit their own proposals and recommendations through the use of an always-on feedback portal. The recommendations in the plan in the pages that follow reflect a deep review, understanding, and

appreciation for all of the inputs received, and a genuine desire to give agency to all campus stakeholders.

The SOU Vitality Plan is distinctive from SOU FORWARD and the Resiliency Plan in one important way. Our campus understands that the Vitality Plan cannot simply be an effort to create a smaller version of our Twentieth Century selves. Instead, the environment demands that we create something truly revolutionary with a realistic awareness of the new landscape of higher education, particularly as it applies to public regional universities.

SOU remains in a financial crisis that is also an identity crisis. The two cannot be solved separately. Faculty visioning sessions, reimagining workshops, and the Resiliency plan all converged on a single conclusion: SOU cannot survive as a generic public regional university trying to be everything to everyone. It can only thrive by becoming undeniably distinctive.

Three facts shaped what comes next.

- SOU's distinctive assets are real and rare. A small-campus intimacy creates an environment where students are known by name. The Rogue Valley is the teaching environment: its bioregion, its arts ecosystem, its rural workforce needs, its Indigenous knowledge, its outdoor recreation economy. SOU faculty's deepest professional commitment is mentorship, with a 154-year history of public service in a region that still needs a university.
- The market is shifting beneath traditional regional universities, including the demographic decline, a credibility crisis in higher education, an artificial intelligence (AI) revolution that is reshaping what knowledge work is worth, and a public-sector funding model that has not kept pace. Institutions that try to compete on the old terms of broader programs, more buildings, and marginal cost advantages will lose.
- A workshop of deans, directors, and chairs went further: stop solving Twenty-First Century challenges with Twentieth Century systems.

Evaluation Criteria

Hundreds of ideas, recommendations, and proposals from both formal and informal groups of campus stakeholders were generated. In relatively short order, leadership needed a decision framework for both the evaluation and consideration of these inputs for inclusion in the final plan. Every proposal was assessed in three stages, in the order described below. Stages A and B establish financial viability metrics. Stage C tested fit with the university vision. A proposal that could not answer Stage A credibly did not proceed, or was placed in a parking lot for future consideration.

A. OVERVIEW OF THE PROPOSAL

Before anything else, each proposal needed to state, plainly:

- Programs / activities eliminated or downsized under the proposal
- Programs / activities combined or redesigned under the proposal
- Number of personnel impacted by the proposal
- Cash savings associated with the proposal (annual, recurring)
- Timeline for realizing cost savings

Standard for advancing: a proposal needed to show real, recurring savings. Those that did not meet this standard were not rejected outright; rather, they were gathered for future consideration.

B. POTENTIAL UNINTENDED CONSEQUENCES

For each proposal, we considered the potential foreseeable second-order effects:

- Fiscal: downstream revenue loss, lost enrollment, stranded costs, or contractual obligations the headline savings may obscure
- For academic programs, cross-program academic impact: courses, prerequisites, or shared faculty other programs depend on
- Marketability of SOU: impact on how prospective students and families perceive the institution and its distinctive promise
- Regional partnerships: impact on the employers, agencies, tribes, festivals, and communities our mission depends on
- Workload: impact on the faculty and staff who remain, and whether the change is sustainable for them
- Responsibility: maintain an acceptable minimum service level for all administrative and support functions

C. FIT WITH PROPOSED REVISED VISION (FOR ACADEMIC PROPOSALS)

Proposals that cleared Stages A and B were tested against the four filters below. Each was a yes/no question; the pattern of answers, informed by judgment, determined a proposal's likelihood for inclusion in the plan.

1. Cornerstone Fit: Does the program clearly advance one of the academic cornerstones?
2. Living Lab Fidelity: Does the program operate through the Living Laboratory model: place as syllabus, structural mentorship, portfolio outputs, flexible calendar, interdisciplinary collaboration, and AI-resilient capacities?
3. Distinction: Would a prospective student choose SOU specifically because of how we offer this program, rather than choosing a larger, cheaper, or closer institution for the same credential?
4. Stewardship: Is the program financially sustainable at realistic enrollment levels, and does it serve the public mission of an Oregon regional university? This filter folds together mission consistency, regional responsiveness, and sufficient student demand.

The Future Southern Oregon University

MISSION

Southern Oregon University educates students for resilient, meaningful lives by making the Rogue Valley our classroom, mentorship our method, and practical and experiential work our curriculum.

This *proposed* new mission names three commitments that, when taken together, are SOU's alone:

- **The Rogue Valley as classroom:** place is not a setting; it is the pedagogy. The bioregion, the arts ecosystem, the rural economy, the Indigenous lands, and the wilderness are the texts that students study and the materials with which they work.
- **Mentorship as method:** the faculty-student relationship is not an extracurricular feature; it is the delivery model. Every student has known mentors. Workload, calendar, and program structures are grounded in this commitment, not built around it.
- **Practical and experiential work as curriculum:** students graduate with portfolios of real work for real audiences with real stakes: performances staged, research published, ventures launched, watersheds restored, communities served. Education produces evidence.

VISION

Southern Oregon University will be the country's defining model of what a regional public university can be: small by choice, distinctive by design, financially resilient, and rooted in place, where every student graduates with real work, real mentors, and human capacities that no machine can replicate.

This *proposed* new vision recognizes that in order to thrive as a public regional university in a Twenty-First century higher education landscape, SOU needs to be mindful of its unique contributions and laser focused on a value proposition for current and prospective students. The SOU Vitality Plan is a bridge to the development of that new institution.

We intend to transform into an institution that:

1. Intentionally **connects to the communities** we serve using a bioregional approach
2. Provides **streamlined pathways** to degree completion in every academic discipline
3. Offers **flexible options** for students through innovative, interdisciplinary academic design models
4. Incorporates a **human-connected approach** to education that is cognizant of the rapid pace of emerging technologies

COMMUNITY CONNECTEDNESS

Many universities claim to be connected to the communities they serve. This plan intends to imagine that connectivity on a much more holistic level. We understand that a public regional university at its

best is far more than an economic prosperity engine. It is also foundational for workforce development and readiness, and intellectual and cultural exploration. Our aim is to move beyond the buzz words and platitudes to operationalize community connectivity.

The new SOU will connect all academic and student activities directly to community businesses, enterprises, agencies, and organizations. This effort will offer many benefits: for students, it will provide far more real-world, bio-regional connected pedagogies and facilitate a higher degree of experiential learning. For community partners, it means leveraging the intellectual and creative energies of students, faculty, and staff to address locally important strategic issues. For the region, more broadly, it facilitates a network of opportunities that will help our communities flourish and celebrate our vibrant cultural distinction.

STREAMLINED DEGREE PATHWAYS AND FLEXIBLE OPTIONS

Our students have taught us the importance of the value judgement they make when considering higher education opportunities. They make decisions based on cost, availability of scholarships and financial aid, and location. What is less frequently talked about, but incredibly important, is the timeline to degree completion. Institutions in this competitive higher education landscape are offering more opportunities for streamlined pathways. SOU has done an admirable job over the last several years to increase the availability and quality of our dual-credit courses (Advanced Southern Credit). As a result, many students start earning college credits at younger age.

The following initiatives will lay the groundwork for our goal of offering streamlined degree pathways in every academic discipline.

- Prioritize Degree in 3, 3+1, and 4+1 models (which offer shortened pathways to a bachelor's degree as well as streamlined options for graduate degrees) and stackable credentials
- Streamline core curricula: multiple majors share core, lower-division curricular increasing interdisciplinary approaches while breaking down silos and reducing curricular overlap that leads to low-enrolled courses
- Curricular flexibility: strategically moving some content online that is suitable for asynchronous delivery to focus limited in-person resources on high-impact applied and community-based learning
- Clear degree pathway documents for every major
- Adapting the university's General Education model to reflect statewide patterns and ease the burden of pathway navigation

HUMAN-CONNECTED APPROACH

As controversial as the national discourse is around artificial intelligence and its effect on current and future life, we understand, particularly at the university, the value of deep interpersonal, human connection. The future landscape of higher education will increasingly involve more synthetic service delivery. As students make value judgements about investments in higher education, many will choose these technologically advanced and likely more cost-efficient options. But there will continue to be a

distinct need for those students who require human connection to succeed academically, emotionally, and personally.

The university recognizes that it must expose students to the AI revolution and educate on issues of ethics and governance. Employers throughout our region have been explicit in their expectations for SOU graduates to help them adapt to current and future technological realities. We can choose to provide that exposure and not shy away from the impact that AI is having on nearly every aspect of human life, conscious of controversies surrounding environmental concerns, ethical usage, or general anxieties for its use. This demands that we be intentional about celebrating the importance of human connection in all of our academic disciplines and student activities. This specific intention, more than any other part of the Vitality Plan, is the link that ties us to our past as an institution and our legacy as a university built on love, caring, inclusion.

Vitality Plan Restructure

ACADEMIC PORTFOLIO

The following academic vision is a culmination of campus and community inputs. It is a synthesis of the extraordinary volume of shared thinking developed over the spring of 2026, including ideas submitted through the Vitality recommendations portal, the Academic Portfolio Workgroup's recommendations, the bioregional applied university white paper, and faculty and student academic visioning workshops. Together, these sources reflect remarkable consistency in their recommendations. Collectively, feedback clearly demonstrated that SOU must maintain a narrow academic portfolio, retain distinctive disciplines while eliminating departmental silos, place experiential learning at the center of the student experience, and reduce administrative overhead. The academic cornerstones and program structure presented here translate that shared conviction into a single, coherent portfolio designed to be financially disciplined, student-centered, and recognizably rooted in the Southern Oregon region.

The university will replace its multiple-dean model and transition to a single Dean of Faculty reporting to the Provost and working directly with department chairs. This is the administrative expression of the principle to eliminate structural silos that organize the academic portfolio: a leaner, flatter structure that realizes meaningful salary savings, clarifies lines of communication, and allows the institution to design, update, and pivot programs with the speed that the current moment demands. This removes layers of administrative mediation, secures immediate salary savings, and places frontline department chairs in a position to offer direct input into academic decision-making and programmatic adjustments. The result is a structure that does more than cut costs; it restores faculty leadership to the heart of the university and ensures that the resources preserved through this transformation flow toward teaching, mentorship, and the distinctive academic experience SOU provides.

THE ROGUE VALLEY LIVING LABORATORY

A pedagogical model, not a program.

The Living Laboratory is what unifies the set of academic cornerstones. It is not a building, a department, or a separate initiative; it is the operating system every program shares. This framework makes it concrete. The Living Laboratory rests on six principles. Every program, existing or new, should be

testable against all six. A program that satisfies fewer than four is, by definition, not yet a Living Laboratory program.

1. Place is the syllabus

Every program will teach with and through the Rogue Valley. The bioregion, the Indigenous histories, the arts ecosystem, the rural economy, and the wilderness are the course content, not field-trip backdrops. Students leave knowing this place deeply because the place is what they studied.

2. Mentorship is structural

Every student will have at least one known mentor for every year of their program. Faculty workload reflects this commitment explicitly: mentorship is counted, supported, and protected, not added on top of teaching loads. Mentorship is the deliverable, not the bonus.

3. Work produces work

Every student will graduate with a portfolio of public-facing outputs: performances staged, research published, ventures launched, communities served, watersheds restored, films completed, businesses built, classrooms taught in. The portfolio is the transcript that matters.

4. Time follows learning

Academic calendars will be designed to optimize student learning. SOU will adopt a mix of formats, such as full terms for foundational coursework, intensive and immersive blocks for field- and project-based learning, or intensive terms for off-season internships, fieldwork, or online learning opportunities. This change is necessitated to strengthen the learning environment and provide teaching flexibility.

5. Structural silos are eliminated

Programs will collaborate around shared curriculum. For example, film students may document a watershed restoration led by environmental science students, or business students build the project incubated by creative-industries students. General education will be reimagined as portfolio-based interdisciplinary work along broad pathways rather than rigid prefix-based requirements.

6. Human-equipping and technology

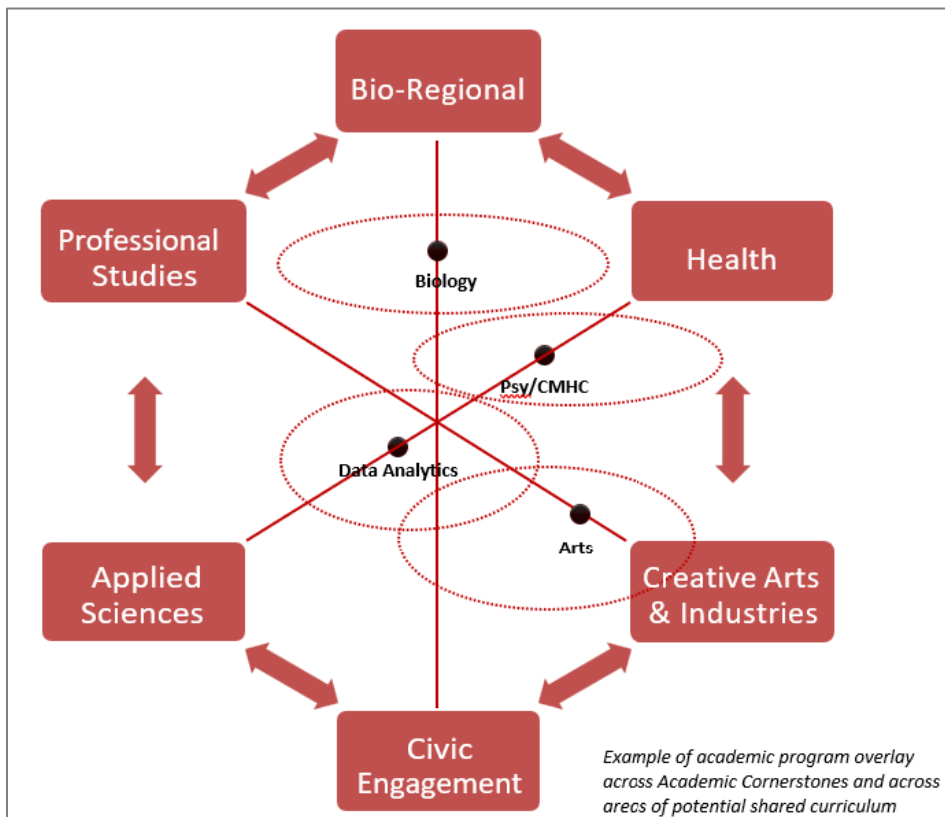
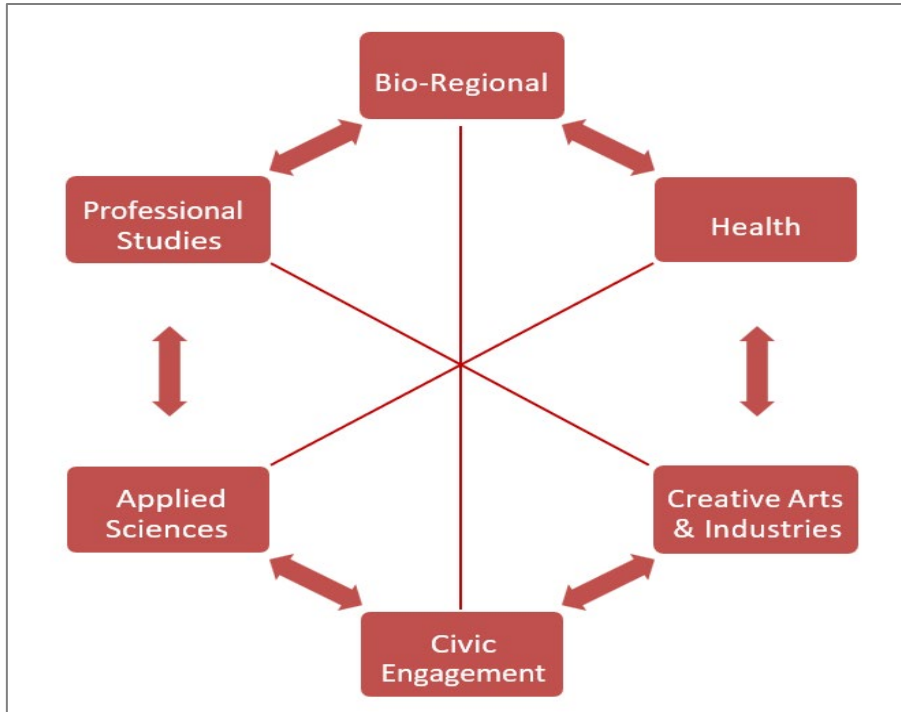
Our curriculum will prioritize the cultivation of essential human capabilities: good judgement, creativity, empathy, ethical reasoning, and strong interpersonal relationships. We will equip our students to critically engage with, adapt to, and design emerging technologies. We will continue to foster academic authenticity, accuracy, and ethical leadership and prepare our graduates to lead in our community today and tomorrow.

REQUIRED KEY PRINCIPLES FOR EVERY ACADEMIC PROGRAM

- 30 -to- 36 credit lower-division General Education model to reflect statewide model
- Potentially add up to 15 upper-division credits in General Education
- 24 -to- 32 credit interdisciplinary academic cornerstone core (6-8 shared courses in each Cornerstone) to include:

- Data literacy
 - Moral and ethical reasoning
 - Cross-cultural collaborations
 - Human and technology interactions
 - Methods and inquiry
 - Practicum/applied learning
 - University integrative capstone
- 60 -to- 80 (including common core listed above) major core
 - Elective credits, minors, etc. to attain 180 total credits to graduate
 - General principles of class size management that include:
 - Emphasis on shared curricular efficiencies across programs
 - Generally, target minimum class sizes of 40 in lower division lecture/hybrid courses
 - Generally, target minimum class sizes of 20 in upper division courses
 - Program targets will undergo a holistic evaluation, with some class size ranges being smaller or larger sections
 - Exceptions may be made, for example in programs with licensure requirements
 - Connected Learning principles at different stages throughout the curriculum that require work or service experience that is directly connected to their academic experience, such as practicum, internships, campus, or other work experience:
 - Experiential learning early in the program focused on an introductory course in the Academic Cornerstone
 - Interdisciplinary capstone at the end of the program
 - Engaging with living laboratory principles
 - Clear degree pathway documents for every major, shifting from lecture to studio: face-to-face class time should focus on debate, troubleshooting, creating, or receiving coaching from faculty
 - Clear transfer articulation pathways for every major
 - Certificate Curriculum: Redefine the meaning of a certificate at SOU to meet industry-specific needs, focused on employer-recognized skills and what adult learners will take, in addition to streamlining those that bring a value to traditional students throughout their program of study
 - Accelerated Pathways: Prioritize 3+1 and 4+1 models
 - Streamline core curricula: multiple majors share core lower-division curricula, increasing interdisciplinary approaches, breaking down silos, and reducing curricular overlap that leads to low-enrolled courses
 - Curricular flexibility: Move content online that is suitable for asynchronous delivery to focus limited in-person resources on high-impact applied and community-based learning (use of the flipped classroom concept, as opposed to the fully online courses concept)

ACADEMIC CORNERSTONES



To embrace fully this new pedagogical model, we recognize the need to make difficult choices about which academic programs are best suited for the future SOU. Therefore, each program was tested against four questions; each is a yes/no answer. The pattern of yes versus no determined the program’s status in the new academic portfolio. These are the same four filters applied in Stage C of the Evaluation Criteria listed previously. This was not a mechanical exercise. The filters were decision aids, not algorithms. Judgment, accreditation requirements, regional commitments, and equity considerations informed the decisions.

#	Filter	The Question
1	Cornerstone Fit	Does this program clearly advance one of the academic cornerstones?
2	Living Lab Fidelity	Could the program operate through the Living Laboratory model: place as syllabus, structural mentorship, portfolio outputs, flexible calendar, interdisciplinary collaboration, AI-resilient capacities?
3	Distinction	Would a prospective student choose SOU specifically because of how we offer this program, versus choosing a larger, cheaper, or closer institution for the same credential?
4	Stewardship	Is the program financially sustainable at realistic enrollment levels and does it serve the public mission of an Oregon regional university?

The new academic portfolio is the result of this extensive analysis. The majors and minors in the university’s new academic portfolio are listed below:

Retained Undergraduate Majors

Applied Economics
 Applied Mathematics
 Art
 Biology
 Biomedical Science
 Business Administration
 Communication
 Computer Science
 Criminal Justice
 Data Science
 Digital Cinema
 Digital Cinema and Production Arts BFA
 Early Childhood Development
 Ecology & Conservation
 Education Studies
 Emerging Media + Design (EMDA)
 English
 Environmental Science & Policy
 Healthcare Administration
 Health & Exercise Science
 History
 Innovation & Leadership

Interdisciplinary Studies
 Media Innovation
 Music
 Outdoor Adventure Leadership
 Psychology
 Sociology & Anthropology
 Sustainability
 Theater Production and Design

Sunsetting Undergraduate Majors

Human Service
 Music Industry and Production
 Financial Mathematics

Retained Graduate Programs

Master’s in Business Administration
 Master’s in Clinical Mental Health Counseling
 Master’s of Science in Education
 Master’s in Teaching
 Master’s in Theater Production & Design
 Master’s in Spanish Language Teaching

Retained Standalone Minors

Chemistry
Gender, Sexuality & Women's Studies

Military Science
Native American Studies

Program Eliminations

Human Service

The elimination of the Human Service program reflects a difficult but necessary realignment of institutional resources. We recognize the value this program has held for students and the community it has served. Importantly, related pathways remain available: Sociology/Anthropology (SOAN) and Psychology both continue, and we are pleased to introduce a new Pre-Counseling certificate. Rogue Community College will continue to offer the Associate of Arts degree in Human Service during the transition. In the months ahead, we will reassess regional needs with the goal of rebuilding programming, potentially in a new format, that allows us to continue meeting community demand in a sustainable way.

Music Industry and Production

While the Music Industry and Production program will be discontinued in its current form, we remain committed to our outstanding music offerings. The Music major and many of its connected ancillary programs will be retained, though the curriculum must be streamlined to ensure long-term viability. We will also maintain a significant presence in emerging media and design and in digital cinema, preserving meaningful creative pathways for our students.

Financial Mathematics

The discontinuation of the Financial Mathematics program allows us to concentrate resources within a strong, cohesive suite of offerings in Mathematics and Computer Science. Students will continue to have access to robust pathways including Applied Economics, Applied Mathematics, Data Analytics, and Computer Science.

As noted previously, the new academic organization will be streamlined. The faculty members who chair our programs will have an integral part of academic decision-making. When evaluating individual faculty for elimination, their ability to teach broadly both within and across disciplinary lines was a paramount driving consideration, and will continue to be essential moving forward with the new structure. The new organizational structure is outlined below.

New Departmental Structure (total faculty) and Majors

- **Biology & Chemistry (9 faculty)**
 - Biology (Chemistry minor)
 - Biomedical Science
- **Business & Economics (14 faculty)**
 - Business (-1)
 - Applied Economics
 - Healthcare Administration
 - Innovation & Leadership
 - Master's in Business Administration

- **Clinical Mental Health Counseling (5 faculty)**
Master's in CMHC
- **Computer Science & Math (7 faculty)**
Computer Science
Applied Mathematics (-1)
Data Analytics
- **Education (11 faculty)**
*Associate Dean of Education
Education (-1)
Master's of Art in Teaching
Master's of Education
- **Environmental Science & Policy (5 faculty)**
Environmental Science
Sustainability
- **Health & Exercise Science (6 faculty)**
Health & Exercise Science (-1)
Outdoor Adventure Leadership (-1)
- **Humanities (13 faculty)**
Communication (-1)
English (Spanish minor) (First-year Seminar, and Language, Literature, & Philosophy) (-3)
- **Library (5 faculty) (-1)**
- **Performing Arts (10 faculty)**
Theatre (-2)
Music (-2)
- **Psychology (8 faculty)**
Psychology (-1)
- **Social Science (12 faculty)**
Criminology and Criminal Justice (-1)
History (-1)
Sociology and Anthropology (GSWS/NAS minors) (-2.67)
- **Visual & Digital Arts (7 faculty)**
Art (-2)
Digital Cinema (-1)
Emerging Media + Digital Arts

The following table illustrates the reductions that will occur across the academic programs—both in the faculty and staff ranks.

Departments	Starting Faculty FTE	FTE Reduction	Classification	
Biology & Chemistry	9.00	0.00	-	
Business & Economics	15.00	1.00	Faculty	
Center for the Advancement of Teaching & Learning		1.00	Unclassified staff	
Clinical Mental Health Counseling	5.00	0.00	-	
Computer Science & Math	8.00	1.00	Faculty	
Education	12.00	1.00	Faculty	
Environmental Science, Policy & Sustainability	5.00	0.00	-	
Health & Exercise Science	8.00	2.00	Faculty	
Humanities	16.00	4.00	Faculty	
Institutional Research		1.00	Unclassified staff	
Library	6.00	1.00	Faculty	
Library		1.00	Unclassified staff	
Library		4.00	Classified staff	
Performing Arts	14.00	4.00	Faculty	
Performing Arts		1.00	Unclassified staff	
Psychology	9.00	1.00	Faculty	
Social Science	15.00	4.67	Faculty	
Visual & Digital Arts	10.00	3.00	Faculty	
Administration	5.00	4.00	Deans	
Faculty Totals	137.00	22.67		
Staff Totals		12.00		
TOTAL SAVINGS				\$5,076,781

STUDENT AFFAIRS AND ENROLLMENT SERVICES

Writ large, student affairs programming contributes to holistic student development and academic success by fostering a sense of belonging outside the classroom. By managing vital campus resources such as mental health counseling, residential life, career services, and diverse student organizations, the professionals who work at SOU have a direct line to student retention and graduation rates. Programming bridges the gap between academic instruction and personal growth, ensuring that students are supported during personal or financial crises and also with leadership skills and emotional resilience for life after graduation.

We recognize the incredibly important role that student affairs programming plays at the university, and we must recognize that the university’s footprint will be smaller in the years to come. In the Vitality

Plan, the number of positions reductions are reflective of this reality. A vacant Care Coordinator position will be eliminated, and care cases will be dispersed among existing colleagues.

The media coordinator position was reduced from 1.0 FTE to .5 FTE during SOU FORWARD. With the recent 16% reduction in incidental fee allocation through the Associated Students of Southern Oregon University (ASSOU), positions funded through this source will be eliminated to stay within budget.

With the decrease in enrollment and the increase in interdisciplinary collaboration, the university will require fewer Student Success Coordinators (SSCs). Within Advising and Orientation, the SSCs will move to a centralized location, and the need for SSCs tied directly to specific schools/colleges will no longer be necessary. SSCs will continue to serve primary academic programs; however, the new support model will require cross training so that caseloads are equitably distributed among individuals.

Youth Programs

SOU's Youth Programs has provided pre-collegiate educational experiences for K-12 students for more than 40 years. The program sparks early college curiosity through residential summer camps like Academy, academic competitions, and culturally specific programs including Academia Latina, and Konaway Nika Tillicum. Additionally, the program offers pathways like Advanced Southern Credit to enable high school students to earn university credits early. By combining academic enrichment with hands-on campus life, SOU has assisted thousands of regional students build confidence and prepare for future higher education success each year.

We recognize the phenomenal success and impact that SOU's Youth Programs have had on the participants, families, and communities in the region and state. Currently, the revenue generated through Advanced Southern Credit has remained in the Youth Programs budget rather than transferring into a more centralized pool of resources for the broader university. In the Vitality Plan, this revenue will shift to provide operational support for campus. By Summer 2027, Youth Programs will be a self-sustaining auxiliary of the university.

Strategic adjustments in this area also reflect process changes introduced through the Workday transition. As we adapt, we are prioritizing programming that strengthens our recruitment pipelines while thoughtfully balancing the needs of both campus and community. We remain committed to sustaining the connections these programs foster, even as we refine how that work is delivered.

International Programs

Strategic adjustments to International Programs account for Workday-driven process changes alongside the broader challenge of declining international student enrollment. We recognize the important role these programs play in enriching our campus community, and we are working to position this area for resilience amid shifting enrollment trends.

Admissions

Strategic adjustments in Admissions are designed to maintain the momentum and effectiveness of our core recruitment initiatives. By concentrating resources where they have the greatest impact, we aim to preserve the strength of the efforts most central to enrolling and supporting future students.

Student Affairs and Enrollment Management	Impacted FTE	Classification	
Student Affairs	5.00	Unclassified staff	
Student Affairs	.50	Classified staff	
Youth Programs	1.00	Unclassified staff	
Youth Programs	1.00	Classified staff	
International Programs	1.00	Unclassified staff	
Admissions	.45	Unclassified staff	
TOTAL SAVINGS			\$793,975

ADMINISTRATIVE FOOTPRINT

The Option Path presented by Deloitte identified three distinct options for service delivery. The first included a partnership with a large institution that theoretically could provide a fee for service. The second would incorporate a consortium of similar institutions to provide services at scale. The third option requires a partnership with a third-party provider. In preparation for the Vitality Plan, the university explored all three of these pathways and identified a fourth: the possibility of reorganizing areas independently without sacrificing a minimum service level.

The Administrative Footprint Working Group quickly assessed that the consortium model would take too long to implement, mirroring a similar analysis by Deloitte. The collection of recommendations from the working group as well as many online submittals revealed a desire to explore independent options. The following are the Vitality Plan recommendations in each functional area:

1. Business Services: Feedback from the campus has been clear about our need to improve data analysis and transparency. In direct response, we will reorganize Business Services to achieve critical cost reductions with an emphasis on data integrity, including collection, analysis, and reporting. This reorganization will allow for a concentrated effort in a Business Intelligence Office composed of financial data analysis, institutional research, and Workday management and governance. The reorganization will incorporate eight staff reductions.
2. Information Technology: The IT team conducted a self-assessment in consultation with leadership assuming a smaller overall footprint for the university. They also prioritized critical items and important service deliveries, such as cyber security and client services. The Vitality Plan will reshape the department by adding a Chief Information Officer/Chief Information Security Officer to provide strategic oversight. This reorganization will also include the elimination of five staff positions.
3. Facilities Management and Planning (FMP): Reshaping this area will require a new way of thinking and contributions from the campus community. The Vitality Plan incorporates the elimination of five staff positions. The answer to this smaller footprint requires a redesign of workflows and service levels and depends upon a shared responsibility for our campus facilities.
4. Service Center: In the Vitality Plan, the Service Center will be eliminated with specific tasks distributed across the university. For example, personnel responsible for contracts will shift to

the General Counsel’s office and driver clearance will move to FMP. The result will eliminate two positions in the Service Center.

In addition, we are exploring a recommendation from consulting firm Campus Works about the possibility of sharing some specialized services with other Oregon universities. As such, we are in discussion with Eastern Oregon University and Western Oregon University. There may be opportunities to share Human Resources functions, cybersecurity capabilities, General Counsel, Title IX/Equity Grievance, contracting, and compliance. Because these are in the discussion and consideration phase, we are not including these in projected savings at this point. We are encouraged by our colleagues’ interest in the partnership and expect to have definitive answers in each no later than December 2026.

The Vitality Plan calls for the elimination of multiple software contracts, with Banner being the largest, totaling more than \$1 million by the end of FY 2027. We have already implemented a number of processes to reduce costs related to credit card fees and our use of third-party vendors for transportation of resources. These two initiatives will generate an \$300,000 in annual savings.

Finance & Administration	Impacted FTE/savings	Classification	
Business Services	8.0	Classified staff	
Business Services	1.0	Unclassified staff	
Information Technology	4.0	Classified staff	
Information Technology	1.0	Unclassified staff	
FMP	5.0	Classified staff	
Software eliminations	\$1,000,000		
Process improvements	\$300,000		
TOTAL SAVINGS			\$3,173,598

UNIVERSITY ADVANCEMENT

A plank in the SOU FORWARD plan identified philanthropy as an integral part of the university’s financial future. Since the publication of that document, philanthropy has continued to grow—by a total of 500% during the last decade. This growth reflects a commitment from donors to the health of the institution and confidence in its durability.

With the challenges that precipitated the SOU Resiliency Plan, the SOU Foundation Board of Trustees approved a massive change in its support structure for the university’s Development and Alumni Relations programs. The decision effectively moved all fundraising-related expenses (including total compensation and service and supply budgets) underneath the SOU Foundation for the duration of the university’s inaugural comprehensive campaign. This cannot be overstated: the agreement made by the foundation, as generous as it is, has a shelf life. At the time of this writing, the university’s ambitious inaugural \$100 million comprehensive campaign has reached an impressive \$67 million in just five years. Based upon the campaign’s current trajectory, it is not unreasonable to imagine the completion of the campaign in the next three years.

At that point, campus leaders will have an important decision to make. The success of the campaign indicates that continued donor support exists for the university. The SOU Foundation will continue to partner with the university to provide financial support for staffing; however, the university must ultimately retain financial responsibility for the enterprise. Successful development and alumni relations programs do not stop and restart. They continue by building upon their success by bringing more and more interested philanthropic partners into the fold. It is therefore critically important that the university prepare, and plan for, reinvesting in Development and Alumni Relations at the completion of the current campaign.

Auxiliary Enterprises

The SOU Vitality Plan acknowledges that our institutional transformation must be far more comprehensive than our administrative footprint and academic portfolio. The Option Path provided by Deloitte rightly recommended an analysis of all our auxiliary functions. We used that Option Path as a resource but expanded our view to look more comprehensively institution wide. Thus, the Vitality Plan proposes new fiscal models for Housing and Dining, Athletics, SOU Farm, Jefferson Public Radio, Schneider Museum of Art, and Higher Education Center in Medford.

HOUSING AND DINING

As articulated in Deloitte's Option Path, several initiatives in SOU Housing and Dining have already been implemented, which are projected to yield more than \$1.1 million in savings annually. These initiatives include discontinuing grade point average (GPA) incentive housing remissions, filling unused housing capacity, and closing the gap between dining pricing and the cost of service. Service hours, menus, and approaches will likely evolve to better match student behavior.

INTERCOLLEGIATE ATHLETICS

Our goal with the SOU Vitality Plan is to move athletics away from dependence on transfers from the university's Education and General Fund. We acknowledge that for institutions like SOU, athletics typically depends on some type of institutional support for fiscal sustainability. Yet, our current challenge demands a shift in thinking. We also acknowledge the important benefits athletics brings to SOU. In addition to being the highest performing public institution in the National Association of Intercollegiate Athletics (NAIA) for six of the last eight years, SOU student-athletes compose 20% of the university's full-time equivalent student enrollment. They also retain, perform, and graduate at higher levels than the student body as a whole. Finally, student-athletes contribute to the university's myriad of backgrounds, origins, and perspectives.

Our challenge for athletics was to close a \$1.5 million annual gap, which would greatly reduce the dependence on institutional funding. Philanthropic commitments for the next two years will total \$1 million per year. The Vitality Plan will also include \$454,000 in permanent cost reductions and a greater reliance on fundraising. Beginning in FY 2027, athletics will implement a new fiscal model with the requirement to be completed and fully self-sustainable by the start of FY 2029.

The chart below indicates the specific cost reductions that will complement the philanthropic support. These specific cost reductions will be implemented in FY 2027.

Athletics	Savings	Notes
Football Asst. Coach	\$91,000	Eliminating 1 unclassified position
Men’s Wrestling	\$65,000	Philanthropic salary offset for head coach
Physical Education Activity fees	\$35,000	Adjunct reductions
Pre-season meals	\$20,000	Cost reduction
Pre-season housing	\$30,000	Cost reduction
Team assessments	\$113,000	Philanthropic offset
Targeted gifts	\$1,000,000	Philanthropic offset (only thru FY 2029)
Remissions	\$100,000	Reductions
TOTAL SAVINGS	\$1,454,000	

SOU FARM

In Deloitte’s Option Path, it was suggested that the SOU Farm become a self-sustaining enterprise. Founded in 2013 as a student-led initiative to foster sustainable farming practices and to provide hands-on experience for SOU students, it has grown in scope and impact. Its work now goes beyond SOU through a robust partnership with Rogue Valley Farm to School, which serves as southern Oregon’s Regional Hub for Education and Procurement. Through this partnership, the SOU Farm is the site for garden education programs for more than 1,000 students from more than a dozen schools in the region. It also serves as an important demonstration site for students from pre-school through fifth grade.

In addition, produce grown at the farm is provided to the SOU campus community, Ashland School District, and local Community Supported Agriculture (CSA) members. The 5-acre farm utilizes State funds to professionally manage the farm and its student workers, support community programs, and deliver hands-on research opportunities for students. Reductions in overall funding will require The Farm at SOU to transition fully to a self-support model by December 31, 2026. Self-support for The Farm at SOU will require collaborative efforts with regional non-profits and/or for-profit farming enterprises.

Farm	Impacted FTE	Classification
Farm manager	2.00	Unclassified staff
TOTAL SAVINGS		\$180,146

JEFFERSON PUBLIC RADIO

The relationship between SOU and JPR extends well beyond half a century. We appreciate the partnership and acknowledge JPR’s importance to the media environment and the region. As with all auxiliary functions, however, we understand the importance of decreasing its dependence on institutional resources. The Option Path from Deloitte recommended that JPR identify a different fiscal sponsor; instead, we have explored a path to reduce SOU support and maintain the relationship.

SOU will maintain the Federal Communications Commission (FCC) broadcast licenses that are essential for JPR to operate. SOU and the JPR Foundation will augment the Agreement to Exchange Services and Support executed in 2017 between the parties to outline steps to shift operational responsibilities for JPR from SOU to the Foundation. This will include hiring all new JPR employees under the JPR Foundation (JPRF) and outlining transitional steps that can be taken to optimize the efficient use of resources and comply with FCC regulations. As long as SOU remains the FCC licensee of JPR stations, JPR’s executive director will remain an employee of SOU, ensuring SOU can independently manage JPR’s FCC licenses. This obligation cannot legally be delegated to JPRF. SOU will fund 15% of JPR executive director’s compensation to support this FCC legal obligation. The terms of all other existing agreements between SOU and the JPRF will remain unchanged, specifically related to JPR's continued occupancy of its studio facility built in 2018 and fully funded by JPRF. Based on JPR’s projected FY27 budget, JPR will be 99.3% self-supported in FY2027.

JPR	Savings	Type
Executive Director	\$162,617	Philanthropic offset via JPR Foundation
TOTAL SAVINGS	\$162,617	

SCHNEIDER MUSEUM OF ART

The Option Path from Deloitte recommended that all entities housed within the academic areas, such as the Schneider Museum of Art, should cover direct and indirect costs through outside revenue and not draw on Education and General funds. While we recognize the museum’s importance as an academic resource, its primary purpose is outward facing. The Museum of Art continues to be a recognized host for contemporary art work, and it has demonstrated philanthropic success through its Master Works on Loan program. As adopted in the Resiliency Plan, museum staff will remain 100% self-sustainable, saving roughly \$350,000 annually.

HIGHER EDUCATION CENTER, MEDFORD

SOU maintains a strong, vibrant, and collaborative partnership with community colleges across the state and around the region. Our most significant partnership is with Rogue Community College, which remains the institution’s largest community college feeder. Our two institutions have shared the RCC/SOU Higher Education Center in downtown Medford since September 2008. Current trends, along with closure of the Small Business Development Center in 2025, now allows for an updated partnership for usage of the HEC. The modified contract allows for additional use by RCC students and a larger share of cost responsibilities for informational technology, maintenance, and custodial services by our community college partner.

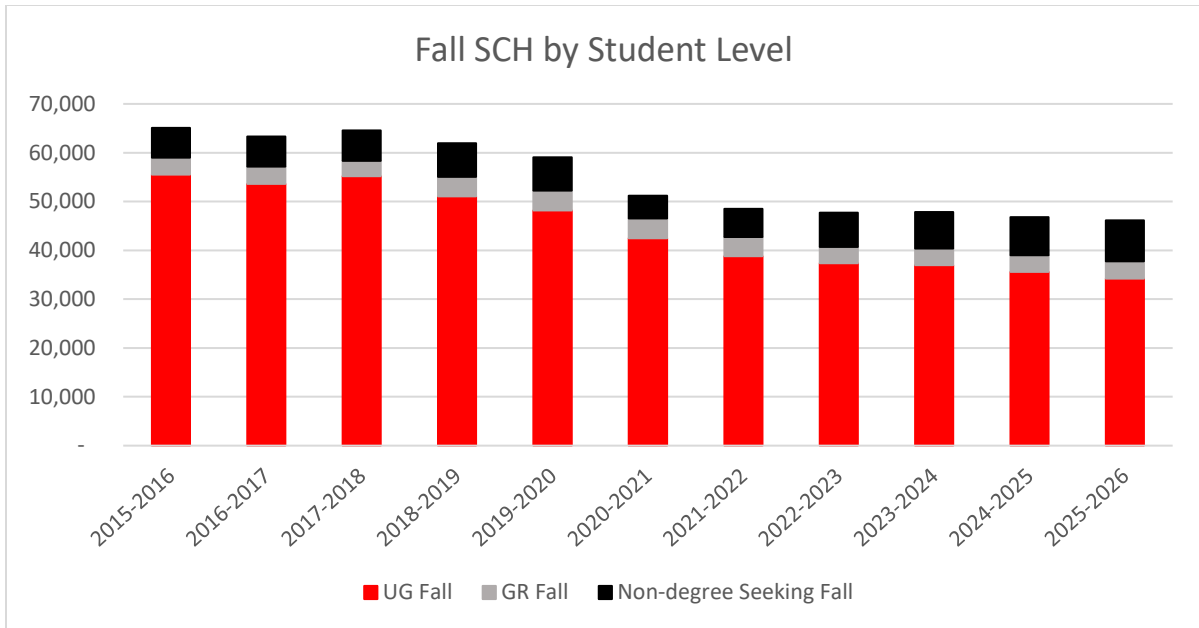
APSOU Provisional Plan Requirements

In accordance with the university’s collective bargaining agreement with APSOU, and in recognition of specifications in Article XII, the following items are included as a part of this Provisional Plan.

Under the Provisional Vitality Plan, the following variables have been evaluated. These assessments reveal a continued state of exigency. As decisions for academic program changes were reviewed, each potential choice was evaluated using these factors:

- a. **Institutional guidelines and mission:** All decisions were made in alignment with a revised Southern Oregon University mission. When continued fiscal challenges persisted after the Resiliency Plan, the mission was revised to be more focused on place-based and experiential learning, and is based on the academic visioning workshops for faculty and students held in the 2025-2026 academic year.
- b. **University admission patterns, historical, current and projected:** All decisions were made in conjunction with the admissions patterns over the past 10 years, focusing specifically on variables from the past 3 years of program-specific data. Additionally, the projected impact of program changes on future enrollment was considered and included in the final assumptions for enrollment projections. For example, the goal of maintaining as many majors as possible through shared curriculum was deemed to be a better direction than simply eliminating the 10 lowest-enrolled programs of study.

Academic Year	Undergraduate Degree-seeking Students	Graduate Degree-seeking Students	Non-degree seeking students (i.e. ASC)
2015-2016	55,530	3,451	6,101
2016-2017	53,650	3,490	6,192
2017-2018	55,177	3,185	6,227
2018-2019	51,081	3,992	6,885
2019-2020	48,148	4,092	6,821
2020-2021	42,458	4,072	4,681
2021-2022	38,821	3,947	5,757
2022-2023	37,348	3,365	7,022
2023-2024	36,988	3,379	7,495
2024-2025	35,610	3,389	7,804
2025-2026	34,205	3,525	8,413
Total % Change	38% Decline	2% Increase	37% Increase



- c. **Program Chairs' and Deans' (previously the Directors') evaluations of the curriculum staffing needs for the next biennium:** Evaluation of staffing impacts reflects the inputs of multiple proposals from multiple constituents. The goal of pursuing 24-to-32 credits of common core in the Academic Cornerstones, along with shared courses including Methods & Inquiry, Practicum/Applied Learning, and University Integrative Capstone reflects the “Connected Learning” paradigm that will preserve the highest number of majors. While this transformation will require substantive curricular revisions, these workloads will be accounted for in the development of the implementation plan.
- d. **The number of sabbaticals, retirements and other personnel requests that require consideration for staffing:** All current sabbaticals are being honored as previously approved. As such, any back-fill needs for term-by-term faculty for teaching requirements will continue to be supported with this Provisional Vitality Plan. Further, sabbatical applications will continue to be accepted and reviewed in the 2026-27 academic year, but the approval of those applications may be delayed for up to two years. All other personnel requests will continue to be assessed based on the overall financial impact to the institution.
- e. **The dependence of other programs within the University on programs:** Each program proposal was evaluated in the context of the potential impact on other programs. All potential programming changes and submitted proposals were evaluated on these criteria:
- The evaluation process follows a strict "Fiscal Reduction First" logic. While our academic vision provides the direction for our rebuild, it does not alleviate our immediate budgetary constraints. Each proposal had to demonstrate credible, recurring savings beyond its academic or historical merit.
 - We upheld accountability by ensuring this process was:

- **Disciplined:** Applying consistent, data-driven questions to every unit.
 - **Clear-eyed:** Recognizing that outright eliminations were possibly required to prevent institutional failure.
 - **Humane:** Making decisions that were defensible, transparent, and respectful of the colleagues who will remain to lead SOU into the future.
- To be considered viable, a proposal had to contribute a meaningful share of the \$8M to \$10M target for Academic Affairs. Evaluators needed to prioritize "Curricular Solutions" that leveraged maximizing efficiency.
 - Proposal validation processes included these five structured data points:

Data Point	Evaluator Action
Eliminations	List all programs, majors, or certificates to be cut entirely
Redesigns	Verify plans for combined or reconfigured majors
Positions Cut	Count total faculty/staff positions eliminated (FTE)
Cash Savings	Confirm total annual, recurring savings in dollars
Timeline	Audit the specific dates for realizing cost savings

- Analyze Unintended Consequences

Fiscal Consequences

Red Flags: Potential for enrollment "free-fall"; loss of downstream revenue; stranded costs (e.g., specialized facilities like ceramics/sculpture buildings); or unresolved contractual obligations.

Cross-Program Impact

Red Flags: Elimination of prerequisites for remaining majors (e.g., how cutting Humanities or Math impacts the School of Education's secondary licensure).

Marketability

Red Flags: Loss of "student audience legibility." Evaluators must reject renaming recognized disciplines to generic titles (e.g., renaming "Theatre" to "Creative Industries") if it makes the program invisible to prospective students.

Regional Partnerships

Red Flags: Damage to the Rogue Valley ecosystem. Evaluators must specifically weigh partnerships, such as OSF, Lithia, Asante, etc.

Workload Sustainability

Red Flags: Proposals that support the current program/curricular complexity or even add to it, including the personnel needed to maintain the level of complexity

- Decision Filters: While these are decision aids rather than rigid algorithms, they required disciplined judgment.
 1. **Cornerstone Fit:** Does the program advance one of the Academic Cornerstones?
 - Bio-Regional
 - Health
 - Creative Arts & Industries
 - Civic Engagement
 - Applied Sciences
 - Professional Studies
 2. **Living Lab Fidelity:** Does the program satisfy at least four of the six principles (Place as Syllabus, Structural Mentorship, Work Produces Work, Time Follows Learning, Eliminating Structural Silos, and Human Equipping and Technology?)
 3. **Student-Centric Streamlined Curriculum:** Does the major conform to the Key Principles for Every Academic Program?
 4. **Stewardship:** Is the program financially sustainable at realistic enrollment levels while serving the public mission?
- The "On the Clock" designation: Any program failing to meet at least three of these four filters is considered "on a clock" for redesign or sunseting. This is not a mechanical dismissal but a mandate for programmatic reconfiguration or elimination within a defined window.
- f. **The ability of existing faculty to cover courses in other programs:** The synthesis of existing majors and minors will require substantive curricular revision. All majors and minors presented in this plan will pull directly from existing faculty expertise, revised programs of study based on many existing courses, and the creation of new shared courses across multiple disciplinary studies. Moving forward, faculty will be required to teach a wide breadth of content.
- g. **The possible reconfiguration of majors or programs of study:** This plan proposes the retention of academic offerings to 30 majors. This alternative to cutting to more majors will require all programs to meet the following expectations by Summer 2027:
 - 30-Credit lower-division General Education model to reflect statewide model (i.e. return to "buckets")
 - Potentially add up to 15 upper division credits

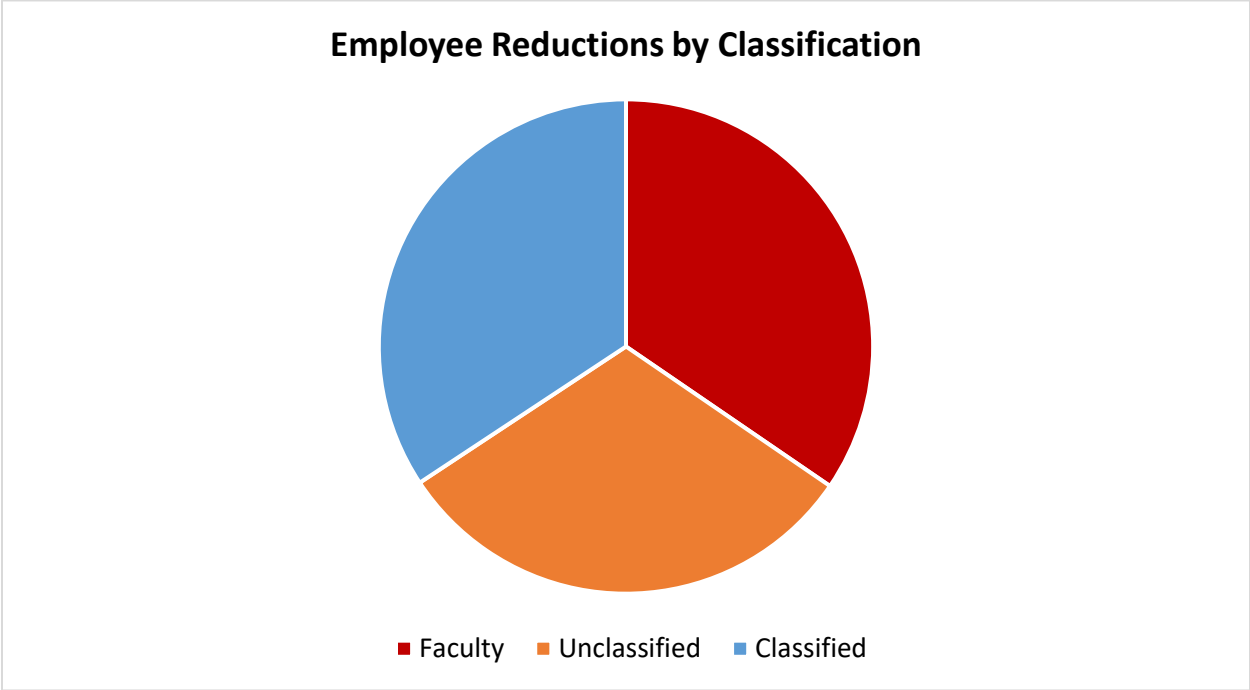
- 24 -to- 32 credit common core in the Academic Cornerstone (6-8 shared courses in each area of study) to include:
 - Methods & Inquiry
 - Practicum/Applied Learning
 - University Integrative Capstone
 - 60 -to- 80 (including common core listed above) major-specific core
 - Elective credits, minors, etc. to attain 180 total credits to graduate
 - Clear degree pathway documents for every major
 - Clear transfer articulation pathways for every major
 - Certificate Curriculum: Create/remove curriculum to meet industry-specific needs
 - Stackable Pathways: Prioritize 3+1 and 4+1 models
 - Clustering and Shared Cores: Adopt the School of Education model (merging MAT/MSEd cores) to reduce low-enrolled course rotations and maximize faculty loading across similar cohorts.
 - Curricular flexibility: Move content online that is suitable for asynchronous delivery to focus limited in-person resources on high-impact applied and community-based learning.
 - Academic Cornerstones are NOT tied to only the programs in their area for shared curriculum
 - Generally, target minimum class sizes of 40 in lower-division lecture/hybrid courses
 - Generally, target minimum class sizes of 20 of upper-division courses
 - Quarterly Chairs Training sessions
- h. **Balance between academic programs and other services:** In an effort to maintain more majors than outlined in the Deloitte plan, the Academic Affairs division proposes that all programs of study will follow the implementation plan to rework, revise, and recreate shared curriculum across disciplines. This approach, compared to eliminating the 10 lowest-enrolled majors, provides an opportunity to continue serving students through a wide range of academic programs with fewer total faculty. While total faculty numbers will decrease, non-academic programs are undergoing similar levels of cost savings outlined throughout the Provisional Vitality Plan.*

Impact on Workforce

For nearly five consecutive years, SOU has endured painstaking reductions to balance its revenues and expenditures. Taken together, SOU FORWARD, the Resiliency Plan, and the Vitality Plan are marked by difficult but existentially necessary downsizing in order to live within our institutional means. In several public gatherings, we acknowledge that those reductions were not based on the caliber or contributions of any specific individual or groups of individuals. All of our colleagues who have lost their positions over the last several years were dedicated and committed and whose service was valued and respected by the institution. Those colleagues, in addition to our colleagues whose positions are identified for elimination in this plan, are contributing to the long-term ability of our institution to be of service for students now and well into the future.

University leaders are committed to helping all employees, regardless of whether they are departing or will remain on campus. We recognize that healing is needed in order for us to move forward in unison. To be sure, the emotional impact of these three plans requires an intentional focus on long-term emotional and cultural healing.

TOTAL REDUCTIONS: SOU FORWARD, RESILIENCY PLAN, VITALITY PLAN



	FACULTY	UNCLASSIFIED	CLASSIFIED	TOTALS
SOU FORWARD	27.03	24.75	30.05	81.83
RESILIENCY PLAN	28.00	28.00	14.00	70.00
VITALITY PLAN	22.67	20.45	22.50	65.65
TOTALS	77.70	73.12	66.55	217.45
	38%	32%	30%	100%

Projected Savings

The table below provides an overview of the anticipated savings to the General Fund and other institutional funds as a result of the Vitality Plan.

BY AREA	AMOUNT
Vitality Plan	
Academic Portfolio	\$5,076,781
Student Affairs and Enrollment Management	\$793,975
Administrative Footprint	\$3,173,598
Dining Services	\$1,100,000
Intercollegiate Athletics	\$1,454,000
Farm at SOU	\$180,146
Jefferson Public Radio	\$162,617
Subtotal Vitality Plan Savings	\$11,941,117
Resiliency Plan Cost Saving Measures Carryforward	
Planned Resiliency Plan Labor	\$5,606,881
Planned Resiliency Plan Service & Supplies	\$3,092,723
Unrealizable Resiliency Plan Savings	\$462,052
TOTAL	\$20,178,669

Revenue Opportunities

In addition to cost savings initiatives in this plan, the university must also consider revenue enhancement opportunities to provide a balanced long-term viability to the financial picture. The following are all items that must be considered in the near-to-middle term:

ENROLLMENT

In February 2026, the Board of Trustees authorized an investment in a contract to conduct highly targeted and sophisticated new student outreach. That process is underway. Along with a redesigned website expected to launch in later summer / early fall 2026 focused exclusively on recruiting prospective students, the initiatives should help the new student pipeline. The institution must also consider strategic investments of future surplus resources (in addition to building fiscal reserves) to marketing and recruitment activities.

RETENTION

The institution must engage in activities designed to increase first-year retention and overall retention rates. Both have traditionally hovered at levels that are better than many institutions but still well below where they need to be. An increase in overall retention will have a dramatic effect on the institution's long-term financial health. Retention efforts must address both the socialization aspect of the student experience (connectedness to other students and the broader community) as well as the financial aspect (exploring unique scholarship opportunities such as housing and dining assistance, or other similar non-tuition student needs)

HOUSING

A significant perennial weight on SOU's overall budget picture stems from the debt service to the student housing project that led to the creation of Raider Village. The Vitality Plan incorporates a reorganization of the university's debt service with the potential of state bonding authority. In the interim, the university plans to use Capital Improvement and Replacement dollars to fix the heating, ventilation, and air condition (HVAC) system in the Music Building. This plan with the debt service would yield an estimated \$2.7 million annually in net positive cash flow for the university on a continuing basis.

OLDER ADULT LIVING COMMUNITY (OALC)

One of the four planks of the SOU FORWARD involved exploring revenue diversification opportunities. From that plan, one exciting opportunity that presented itself was the establishment of an older adult living community on the site of the former residential Cascade Complex. In 2025, Cascade Hall was razed with funding from the state, and a formal procurement process led to a potential partnership that was delayed because of external factors unrelated to SOU. In 2026, a renewed focus on the project resurfaced when it was announced that a tract in Ashland (which includes the SOU campus) may be included as a potential Opportunity Zone designation, which would open the door to increased outside funding opportunities for development projects (like the OALC), and likely reinvigorate the project as close to shovel-ready.

PARTNERSHIP WITH CITY OF ASHLAND

In early 2026, the City of Ashland had to vacate its City Hall facility because of structural complications. As the city explores what will likely be a multi-year rehabilitation of that building, there may be opportunities for SOU to partner with the city to locate many of its City Hall offices and spaces to the campus. Consideration must be given for public access (including parking) and office space, in addition to city council meeting and gathering spaces. This may offer a benefit both for city officials and the university.

LA CLINICA

SOU enjoys a prosperous partnership with La Clinica, a non-profit health care provider, to operate the university's Student Health and Wellness Center. With recent changes to the Ashland Community Hospital and the overall access to health care opportunities in the region, there may be an opportunity to expand La Clinica's footprint on the campus, which would also allow it to offer services to SOU faculty and staff in addition to students, and perhaps even to local community members. The increased space requirement could generate a revenue stream for the institution while expanding health care access for the region. La Clinica has expressed interest in an enhanced partnership, and SOU should consider it as soon as practical.

ACADEMIC CALENDAR CONSIDERATIONS

Several inputs from the campus community, most notably including the Academic Portfolio Work Group, proposed that the university consider moving the academic calendar to more closely align with colleges and universities organized by a semester structure (which account for most institutions in the country). An example calendar could still utilize terms, but organized differently (such as starting 10-week terms in mid August, early January, and mid to late March, with extended winter and spring breaks available for intensive synchronous or asynchronous programming). This also would open the possibility for five-week block scheduling, which could unlock academic cornerstone experiential learning. A new calendar could become an attractive alternative for Oregonians and contribute to increased tuition revenue. We acknowledge the desire to gather more information to create a cost-benefit analysis but strongly suggest a university wide exploration of the topic.

Conclusion

As challenging as this process has been, we know that there are still likely to be future challenges to the landscape. State economists have already predicted burdens to state agencies to help fix assumptions made about pension and medical packages over the last few decades that have not panned out. This means that there are still headwinds that we will likely have to navigate as an institution. This plan will position Southern Oregon University for that navigation.

Appendix A: Community Engagement

How Public and Campus Feedback Shaped the Final Plan

A cross-reference of Vitality Plan recommendations to the community, student, faculty, and staff feedback that informed them.

PURPOSE

During the development of the Vitality Plan, Southern Oregon University invited students, faculty, staff, alumni, and community partners to contribute ideas. The venues for collecting these contributions were through two volunteer working groups, facilitated student planning sessions, and an always-on online recommendations portal, as well as a number of stand-alone proposals submitted directly to the university.

This appendix demonstrates that those contributions were heard and incorporated. The intent is transparency: to show the public, in a single place, that the final plan is “a culmination of campus and community inputs” reflecting “a deep review, understanding, and appreciation for all of the inputs received.”

REFERENCE LIST OF FEEDBACK DOCUMENTS

The following fourteen feedback sources informed the Vitality Plan. Each is assigned a reference number (F1–F14) used throughout the appendix and the summary matrix. *NOTE: This is not an exhaustive list, but rather a sample to demonstrate how campus stakeholders influenced the plan’s development.*

F1 — Online Vitality Recommendations Portal: Summary and Raw Data (May 27, 2026)

The university's always-on public feedback portal captured 58 unique submissions across four stakeholder groups: Students (17%), Faculty (25%), Staff/classified & unclassified (33%), and Community/alumni, partners, visitors (19%). Where this document is cited below, the specific stakeholder group is noted in parentheses.

F2 — Academic Portfolio Vitality Working Group Proposal (May 31, 2026)

The recommendations of the faculty/staff working group charged with reshaping the academic portfolio proposes a single Dean of Faculty model, a 'Communiversality' place-based identity, shared/consolidated core curricula, streamlined degree pathways, a reinvented academic calendar, and expanded regional and Tribal partnerships.

F3 — Administrative Footprint and Back-Office Working Group Proposal (May 25, 2026)

Recommendations of the working group charged with the non-academic administrative footprint covers Business Services, IT (including Banner sunset), Facilities, Campus Public Safety (CPS), HR, Budget/Institutional Research (IR), shared-services and consortium models, and a post-graduate work program.

F4 — Student Vitality Planning Sessions Report (May 22, 2026)

The synthesis of two facilitated student workshops prepared by the Assistant Vice President (AVP) of Student Affairs & Dean of Students organizes student input into five strategic pillars and a reduce / consolidate / eliminate / redesign framework, with specific concepts for advising, general education, affordability, and regional partnerships.

F5 — The Bioregional University of Applied Practice White Paper (May 2026)

A community/industry white paper proposes that SOU organize its retained programs around a unifying bioregional, applied, AI-aware strategic identity built on a set of cross-disciplinary 'anchors,' while still meeting the \$20M savings target.

F6 — Music Department Workgroup Ideas

The music faculty brainstorming document (explicitly non-binding ideas pending a faculty vote) proposes consolidation of music degrees, online/hybrid delivery, migration of audio/production work toward Emerging Media & Digital Arts, scholarship-fund consolidation, and a conservatory model.

F7 — Ideas for the Theatre Department

An advocacy and growth proposal for the Theatre program argues against faculty-line cuts and outlines revenue expansion through camps, certificates, professional/workforce training, and recruitment.

F8 — SOU Music Program Curriculum Proposal (community member)

A community member proposes to refocus the Music program on practical, industry-centric, conservatory-style training (modeled on AMDA/CalArts), with reduced theory/history, performance and technology emphasis, and collaboration with the Theatre Department.

F9 — Proposal for a Regional Cooperative Dining and Procurement Model

This proposal explores a regional cooperative dining and food-procurement model leveraging local restaurants, Rogue Valley farms, existing culinary staff, and partners such as Rogue Valley Farm to School.

F10 — Public Data Center Colocation Facility Proposal (May 18, 2026)

This proposal recommends sharing data-center infrastructure and costs by co-locating SOU servers with another public entity (e.g., Ashland School District or Rogue Community College), and/or leasing SOU data-center space as revenue.

F11 — SOU / La Clinica / City of Ashland Partnership Opportunity (May 20, 2026)

A community partnership concept proposes to expand the SOU/La Clinica Student Health & Wellness Center into a regional healthcare and health-professions training hub, with behavioral-health workforce development and possible relocation to Britt Hall.

F12 — The Future is at SOU — Creative Arts, Climate Action & Sustainability Innovation Initiative

This community proposal recommends connecting SOU's at-risk creative-arts and sustainability programs into an interdisciplinary, community-facing institute with certificates, consulting, and regional partnerships.

F13 — The SOU Honors College of the Siskiyou

This proposal reimagines the Honors Program as a place-based 'Honors College of the Siskiyou,' with a streamlined 42-credit honors general-education curriculum, a Native American Studies thread, experiential 'Take the Lead' projects, and a low/no-cost endowed-chair governance model.

F14 — ASSOU Student Townhall with the President and Provost (June 3, 2026)

A student town hall hosted by the Associated Students of Southern Oregon University (ASSOU) with the President and Provost generated student ideas, including consolidation of lower-division courses; more flexible and streamlined student pathways; reducing time to degree completion; artificial-intelligence governance, ethics, and usage; and a human-centered approach to education.

SECTION-BY-SECTION CROSS-REFERENCE

Each entry below pairs a recommendation from the Vitality Plan with the feedback document(s) in which the corresponding idea appears. Citations use the reference numbers from the list above.

1. An Inclusive, Transparent Process

The plan's Strategy and Approach describes two working groups (academic portfolio and administrative footprint), facilitated student dialogues, and an always-on feedback portal whose outputs were reviewed and incorporated. Those very channels are the feedback documents catalogued here.

- **Two volunteer working groups — one on the academic portfolio, one on the administrative footprint** — *Reflected in: F2 (Academic Portfolio Working Group); F3 (Administrative Footprint Working Group)*
- **Facilitated dialogues with student volunteers** — *Reflected in: F4 (Student Vitality Planning Sessions)*
- **An always-on feedback portal open to all campus and community contributors** — *Reflected in: F1 (Recommendations Portal — all groups)*
- **Genuine respect for, and a deep review of, all contributions; concern that community voices be heard** — *Reflected in: F1 (Community — 'lack of focus on the community'; frustration about prior input not acknowledged); F4*

2. A Distinctive Identity: Becoming “Undeniably Distinctive”

The plan's conclusion that SOU “cannot survive as a generic public regional university” and must instead become distinctive, leaning into place, mirrors a recurring theme across the feedback.

- **SOU must build from its distinctive strengths rather than competing on scale; 'cannot cut its way to greatness'** — *Reflected in: F1 (Students & Faculty — lean into distinctiveness: small classes, faculty relationships, regional/outdoor identity); F4 (preserve distinctive identity)*
- **Stop solving 21st-century challenges with 20th-century systems; pursue a frame-breaking, place-based model** — *Reflected in: F5 (designing 'backwards from the future,' bioregional applied identity); F2 ('Communiversality' place-based model)*
- **Reject a 'generic online institution'; the valley is a competitive edge to lean into** — *Reflected in: F1 (Staff & Faculty — balance online growth with place-based identity)*

3. Mission and Vision

The proposed mission (Rogue Valley as classroom, mentorship as method, experiential work as curriculum) and vision (small by choice, distinctive by design, rooted in place, producing graduates with capacities no machine can replicate) draw directly on feedback themes.

- **Place / the Rogue Valley as the pedagogy (bioregional, applied, experiential)** — *Reflected in: F5 (bioregional applied lens); F2 (place-based 'Communiversality,' co-op experiential model); F4 (place-based, experiential learning); F13 ('Rooted in Place')*
- **Mentorship and small-scale, known-by-name education as a premium asset** — *Reflected in: F2 ('College of Community & Belonging,' small classes as a premium asset); F1 (small classes & faculty relationships); F4 (protect advising and faculty/student connection)*

- **Human capacities that AI cannot replace as the graduate's value proposition** — *Reflected in: F5 (AI as the 'missing variable'; equip graduates to use AI); F4 (protect distinctly human supports); F14 (human-centered education)*

4. Community Connectedness

The plan's commitment to operationalize community connectivity — tying academic and student activity directly to regional businesses, agencies, and organizations — echoes a strong community-engagement thread in the feedback, including several stand-alone partnership proposals.

- **Engage the community directly and bring outside partners 'to the table'** — *Reflected in: F1 (Community — local business/arts/innovation working groups; 'bring at least \$2M from partnerships'); F4 (community-integrated campus model)*
- **Concrete community partnership proposals received and reflected in this direction** — *Reflected in: F9 (regional cooperative dining/procurement); F11 (La Clinica health-professions hub); F10 (shared public data center); F12 (creative-arts & sustainability institute)*
- **Regional employers engaged as strategic partners (e.g., Lithia, Harry & David, Asante, Providence, Medford School District)** — *Reflected in: F1 (Community — bring regional employers into planning); F4 (regional employer pipelines)*

5. Streamlined Degree Pathways and Flexible Options

The plan's initiatives for streamlined pathways to degree completion in every discipline closely track student, staff, faculty, and working-group recommendations.

- **Degree-in-3, 3+1 and 4+1 accelerated and stackable models; reduce time to degree completion** — *Reflected in: F2 (degree-in-three); F1 (Faculty/Staff — accelerated formats, stackable graduate certificates); F14 (streamlined pathways; reducing time to degree completion)*
- **Streamlined / shared core curricula across majors; consolidate lower-division courses** — *Reflected in: F2 (combine core classes — research methods, statistics, practicum; shared cores); F1 (Faculty — interdisciplinary departments, streamlined majors); F4 (interdisciplinary consolidation); F14 (consolidation of lower-division courses)*
- **More flexible student pathways and options** — *Reflected in: F1 (Staff/Faculty — hyflex, accelerated, flexible delivery); F4 (flexible/hybrid models); F14 (more flexible student pathways)*
- **Curricular flexibility — move suitable content online/asynchronous; flipped-classroom focus** — *Reflected in: F1 (Staff — hyflex campus; Faculty — flipped/hybrid; the self-directed online curriculum suggestion); F6 (online/hybrid delivery)*
- **Adapt General Education to the statewide pattern (return to GE 'buckets'/leverage Associate of Arts Oregon Transfer (AAOT) and ease pathway navigation** — *Reflected in: F2 (simplify GE on the AAOT model); F1 (Faculty — scale back gen ed); F4 (general-education redesign)*
- **Clear degree-pathway documents and transfer articulation for every major** — *Reflected in: F1 (Students — written assurance of required courses/advising); F2 (AAOT-aligned seamless transfer); F4 (increased transfer flexibility)*

6. Human-Connected Approach to Technology and AI

The plan's emphasis on human connection alongside intentional engagement with AI reflects both enthusiasm for, and caution about, technology in the feedback.

- **Expose students to AI and equip them to engage, adapt to, and design emerging technologies; address AI governance, ethics, and usage** — *Reflected in: F5 (position graduates to wield AI tools); F2 (AI-literacy component paired with human-to-human interaction); F14 (AI governance, ethics, and usage)*
- **Celebrate human connection as central to education alongside technology** — *Reflected in: F5; F2; F14 (human-centered education)*
- **Use AI/data tools thoughtfully for advising and operations, with appropriate caution** — *Reflected in: F1 (Faculty — AI-supported advising); F3 (measured discussion of AI's value and limits in operations)*

7. A Leaner Academic Structure — Single Dean of Faculty and Chairs-Led Consultation

The plan replaces the multiple-dean model in favor of a single Dean of Faculty reporting to the Provost and working directly with department chairs. This is one of the most directly sourced recommendations in the feedback.

- **Replace the multiple-dean model with a single 'Dean of Faculty' reporting to the Provost, working directly with chairs** — *Reflected in: F2 (explicit single Dean of Faculty recommendation); F3 (Dean of Faculty; eliminate deans)*
- **Reduce academic administration / deans and restore faculty leadership closest to students** — *Reflected in: F1 (Faculty — 'Eliminate Deans and SSCs; downsize academic administrators'); F4 (reduce middle-management layers)*
- **Eliminate structural silos through a flatter, more agile structure that can pivot programs quickly** — *Reflected in: F2 (curricular agility; remove multi-year approval barriers); F1 (Faculty — interdisciplinary, de-siloed structure)*

8. The Rogue Valley Living Laboratory (Six Principles)

The Living Laboratory pedagogical model — place as syllabus, structural mentorship, work-produces-work portfolios, a flexible calendar, eliminated silos, and human-equipping with technology — synthesizes several feedback streams.

- **Place is the syllabus; bioregional, applied learning across every program** — *Reflected in: F5 (bioregional applied practice; white paper place-based model, also named in F1 Faculty input); F2 (place-based, regionally responsive)*
- **Mentorship is structural; portfolios of public-facing work as the real transcript** — *Reflected in: F13 (experiential 'Take the Lead' projects, senior portfolio); F2 (mentor where it matters; transdisciplinary capstones)*
- **Time follows learning — flexible calendar with intensive/immersive blocks** — *Reflected in: F2 (5-week modular block scheduling; reinvented academic calendar); F1 (Faculty — accelerated 5-/8-week sessions, Old Dominion model)*
- **Structural silos eliminated through interdisciplinary, shared work** — *Reflected in: F1 (Student — umbrella Social Science structure; Faculty — interdisciplinary departments); F5 (re-mixable cross-disciplinary anchors)*
- **Human-equipping and technology — cultivate judgment, creativity, ethics, plus AI fluency** — *Reflected in: F5; F2 (human-to-human plus AI literacy)*

9. Required Key Principles for Every Academic Program

The required program principles — class-size management, stackable/accelerated pathways, shared cores, certificate redesign, and flexible delivery — track the working-group and portal recommendations.

- **General principles of class-size management with holistic evaluation** — *Reflected in: F1 (Faculty — concern that an 18-student minimum was too high; plan responds with a holistic, exception-aware approach); F2 (larger shared sections, split-level courses)*
- **Certificate curriculum redefined for employer-recognized, industry-specific skills** — *Reflected in: F1 (Students/Staff — stackable graduate certificates, employer cohorts, Credit for Prior Learning); F2 (workforce-aligned credentials)*
- **Clustering and shared cores to reduce low-enrolled courses** — *Reflected in: F2 (consolidate duplicative courses; shared cores); F4 (academic-portfolio consolidation); F14 (consolidation of lower-division courses)*
- **Quarterly chairs training and chairs-led academic decision-making** — *Reflected in: F3 (chairs/directors given budget tools and accountability); F2 (chairs work directly with the Dean of Faculty)*

10. The Academic Cornerstones

The plan organizes the portfolio around six Academic Cornerstones (Bio-Regional, Health, Creative Arts & Industries, Civic Engagement, Applied Sciences, Professional Studies). The structure of unifying, cross-disciplinary 'anchors' was explicitly proposed in the feedback.

- **Organize programs as cross-disciplinary cornerstones rather than siloed departments** — *Reflected in: F5 (the five 'Anchors': Applied Technology, Applied Enterprise, Applied Bioregional Ecology, Applied Creative Economy, Applied Human Services)*
- **Connect creative arts, sustainability, and civic/community engagement into integrated pathways** — *Reflected in: F12 (interdisciplinary creative-arts + climate/sustainability ecosystem)*

11. Program Portfolio Decisions (Retentions, Reconfigurations, and Sunsets)

Specific program decisions in the plan align with named recommendations in the feedback. Several retentions reflect direct community and faculty advocacy.

- **Music major retained but streamlined; Music Industry & Production sunset; creative pathways preserved via EMDA and digital cinema** — *Reflected in: F6 (consolidate music degrees; migrate audio/production toward EMDA); F5 (music audio/production migrate into EMDA); F8 (industry-centric conservatory refocus); F1 (Faculty — merge MIPS/vocal toward musical theatre)*
- **Pre-nursing students given a permanent home in the new Biology & Chemistry department** — *Reflected in: F1 (Faculty — detailed proposal to house Pre-nursing in Biology & Chemistry)*
- **Financial Mathematics sunset; resources concentrated in Mathematics, Computer Science, Data Science, Applied Economics** — *Reflected in: F1 (Faculty — preserve shared upper-division quantitative infrastructure; 'Computer and Data Science' structure); F5 (Math retained as a service unit; Economics folded into Applied Enterprise)*
- **Gender, Sexuality & Women's Studies (GSWS) retained as a standalone minor** — *Reflected in: F1 (Faculty — detailed case to retain GSWS in a modified, financially sustainable form)*

- **Native American Studies retained as a standalone minor** — *Reflected in: F1 (Students — 'Do not cut Native American Studies' (NAS)); F13 (Native American Studies thread/certificate); F4 (Native American-serving institution exploration)*
- **Social Science programs consolidated into one department (Criminology, History, Sociology/Anthropology with GSWS/NAS minors)** — *Reflected in: F1 (Student — umbrella 'Social Science' degree; Faculty — interdisciplinary social-science foundation)*
- **Human Service degree sunsets, and focus on a new Pre-Counseling certificate; Clinical Mental Health Counseling (CMHC) and behavioral-health pathways retained** — *Reflected in: F1 (Faculty — grow CMHC, community clinic, behavioral-health pathways); F5 (Applied Human Services anchor); F11 (behavioral-health workforce development)*
- **Theatre retained (Theatre Production & Design; Master's in Theatre)** — *Reflected in: F7 (Theatre growth/anti-cut proposal); F8 (Theatre collaboration); F1 (Community — preserve theatre as a cultural anchor)*

12. Student Affairs, Advising, and Enrollment Services

The plan centralizes advising, reduces and cross-trains Student Success Coordinators, and refocuses enrollment resources — closely matching staff, faculty, and student recommendations.

- **Centralize advising and cross-train across SSCs, faculty, TRiO, University Coaching and Mentoring (UCAM,) Bridge, and first-year support** — *Reflected in: F1 (Staff — centralize academic support, cross-train advising teams; Faculty — reduce SSCs); F4 (centralized professional advising model / 'Student Success Center'); F3 (shift more advising to faculty)*
- **Move SSCs to a centralized model with equitably distributed caseloads** — *Reflected in: F1 (Staff — end advising silos/duplication); F2 (reduce duplication)*
- **Youth Programs moves toward self-sustaining auxiliary; build recruitment pipelines via early-college and summer pathways** — *Reflected in: F2 (expanded summer programming; high-school credit pathways); F1 (Staff — UNCOSA-style high-school senior program; on-site charter school pipeline)*

13. Administrative Footprint and Back-Office Reorganization

The plan's reorganization of Business Services into a Business Intelligence Office, IT restructuring, Service Center elimination, shared-services exploration, and software contract elimination tracks the Administrative Footprint group and portal feedback in detail.

- **Reorganize Business Services around data integrity, analysis, and reporting (Business Intelligence Office)** — *Reflected in: F1 (Staff — use predictive analytics/data for scheduling; regulate irregular registrations); F3 (push budget ownership to departments; OpenLedger tool); F4 (institutional efficiency)*
- **IT restructuring (dual CIO/CISO position; prioritize cybersecurity and client services; leaner staffing)** — *Reflected in: F3 (consolidate IT management; outsource select functions; student workers)*
- **Eliminate the Service Center and redistribute its functions across the university** — *Reflected in: F3 (outsource/remove the Service Center; disperse functions back to departments)*

- **Explore shared/consortium services with other Oregon universities (EOU, WOU)** — *Reflected in: F3 (anchor/consortium model; shared HR/IT/legal with partners); F1 (Faculty — shared services, RCC partnership emphasis)*
- **Eliminate Banner-related software contracts (>\$1M)** — *Reflected in: F3 (sunset Banner — ~\$1.2M savings)*

14. University Advancement and Philanthropy

The plan's continued reliance on philanthropy and the SOU Foundation, and its commitment to reinvest in development, reflect donor-focused suggestions in the feedback.

- **Use donor and Foundation support to sustain ongoing program operations (e.g., annual unrestricted gifts)** — *Reflected in: F1 (Students/Community — donors fund ongoing operations for music, athletics, arts); F8/F6 (music philanthropy and scholarship-fund consolidation)*
- **Focus the SOU Foundation on new opportunities such as endowed chairs** — *Reflected in: F2 (endowed faculty/chairs); F13 (endowed chair of Honors)*

15. Auxiliary Enterprises

The plan proposes new fiscal models for Housing & Dining, Athletics, the SOU Farm, JPR, the Schneider Museum, Youth Programs, and the Medford Higher Education Center — areas addressed across the feedback.

- **Housing & Dining: pricing/efficiency changes and community-integrated dining models** — *Reflected in: F9 (regional cooperative dining & procurement model); F1/F4 (dining and auxiliary partnerships); F2 (student-run dining)*
- **Athletics moves toward self-sustainability via cost reductions and philanthropy (e.g., graduate-assistant coaching)** — *Reflected in: F1 (Students — protect athletics but fund via donors; student-coach intern program; eliminate Assistant Director, Sports Information)*
- **SOU Farm transition to a self-support auxiliary with regional non-profit/for-profit partners** — *Reflected in: F9 (Rogue Valley Farm to School partnership); F1 (Community — Rogue Valley Food System partnership); F12 (sustainability programming)*
- **Higher Education Center, Medford — updated, expanded partnership with Rogue Community College** — *Reflected in: F1/F4 (prioritize RCC partnerships); F10 (RCC as a shared-infrastructure partner)*

16. Workforce Reductions Handled with Compassion

The plan's emphasis on achieving reductions through vacancies, voluntary measures, and retirements — and its focus on dignity and healing — reflects 'people-centered' suggestions in the feedback.

- **Prioritize voluntary separations and early-retirement incentives before involuntary layoffs** — *Reflected in: F1 (Staff — voluntary separation, early-retirement/buyout incentives, shared reductions); F2 (retirement-based line reductions; extend health insurance to incentivize early retirement)*
- **Consider flexible models (reduced contracts, 10-month operations, remote/reduced-hour options)** — *Reflected in: F1 (Staff — 10-month operations, remote-work-for-pay-reduction, 32-hour week for staff-students)*

- **Center dignity, morale, and long-term cultural healing** — *Reflected in: F1 (Staff — compassion and choice in the process); F4 (protect community and belonging)*

17. Facilities Footprint and Shared Responsibility

The plan's smaller facilities footprint, shared responsibility for campus facilities, and debt restructuring align with feedback on space, buildings, and operating costs.

- **Shrink the physical footprint; consolidate, sell, lease, or repurpose underused buildings and land** — *Reflected in: F1 (Community/Faculty — sell/lease land and buildings; reduce the 175-acre footprint); F2 (sell/rent buildings; City of Ashland as a renter); F3 (reduce buildings in use; close campus one day/week)*
- **Share facilities/services and explore co-location to reduce costs** — *Reflected in: F10 (shared public data center / lease SOU data-center space); F3 (shared FMP services with City of Ashland & ASD)*

18. Transparency and Accountability

The plan's guiding principle of transparency, and departmental accountability for results, reflect repeated calls in the feedback.

- **Publish transparent progress reporting (savings, enrollment, retention, service levels, risks)** — *Reflected in: F1 (Students/Community — public dashboard and monthly reporting); F4 (transparency & accountability pillar); F3 (make the process public)*
- **Hold departments accountable for measurable academic and financial objectives** — *Reflected in: F1 (Students — set/track objectives by department; Staff — data-driven accountability); F3 (departments need 'skin in the game')*

PROPOSALS RECEIVED AND HELD FOR FUTURE CONSIDERATION

Consistent with the plan's stated practice of placing promising ideas that did not yet show immediate recurring savings into a 'parking lot' for future consideration, the following community and campus proposals were received and reviewed. Several remain under active exploration as future potential partnerships (for example, healthcare, dining, shared services, and data-center collaboration).

- **Merger or system-level restructuring** — *Reflected in: F1 (Students/Community — possible merger with PSU; a California-style UC system for Oregon; specialized statewide campuses)*
- **On-site community charter school as a teaching lab and pipeline** — *Reflected in: F1 (Staff)*
- **Shared public data center / co-location with ASD or RCC** — *Reflected in: F10*
- **SOU/La Clinica/City of Ashland health-professions hub (Britt Hall)** — *Reflected in: F11*
- **Creative Arts, Climate Action & Sustainability Innovation Institute** — *Reflected in: F12*
- **Honors College of the Siskiyou (expanded model)** — *Reflected in: F13*
- **Centralized SOU call center; Native American-Serving Institution designation; non-profit banking/postage savings** — *Reflected in: F1*

SUMMARY MATRIX

A dot (●) indicates that the feedback document raised an idea reflected in the corresponding element of the Vitality Plan. Document numbers F1–F14 correspond to the Reference List above.

Vitality Plan element	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12	F13	F14
Inclusive, transparent process	●	●	●	●										
Distinctive, place-based identity	●	●		●	●									
Mission & vision (place, mentorship, experiential)	●	●		●	●								●	●
Community connectedness & partnerships	●	●		●					●	●	●	●		
Streamlined / accelerated degree pathways; time to degree	●	●		●									●	●
General-education redesign / consolidate lower division	●	●		●										●
Flexible/online/hybrid delivery & flexible pathways	●			●		●								●
Human-connected approach to AI (governance, ethics, usage)	●	●	●		●									●
Single Dean of Faculty / chairs-led structure	●	●	●	●	●									
Living Laboratory / experiential portfolios	●	●			●								●	
Academic Cornerstones / anchors					●							●		
Music streamlined; MIPS sunset; EMDA pathways	●				●	●		●						
Pre-nursing into Biology & Chemistry	●													
Financial Math sunset; Math/CS/Data consolidation	●				●									
Retain GSWS minor	●													
Retain Native American Studies	●			●									●	
Theatre retained	●						●	●						
Centralized advising / fewer SSCs	●	●	●	●										
Business Intelligence / data-driven operations	●		●	●										
Eliminate Service Center; IT restructure			●											
Shared services / consortium (EOU/WOU/RCC)	●		●							●				
Banner software elimination			●											
Philanthropy / endowed chairs	●	●				●		●					●	

Vitality Plan element	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12	F13	F14
Community-integrated dining model	•	•		•					•					
Athletics self-sustainability	•													
SOU Farm self-support / regional partners	•								•			•		
HEC Medford / RCC partnership	•			•						•				
Voluntary, compassionate workforce reduction	•	•	•											
Reduce facilities footprint; sell/lease space	•	•	•							•				
Transparency & departmental accountability	•		•	•										

Legend: F1 Recommendations Portal · F2 Academic Portfolio WG · F3 Administrative Footprint WG · F4 Student Planning Sessions · F5 Bioregional University White Paper · F6 Music Dept Workgroup · F7 Ideas for Theatre · F8 SOU Music Curriculum Proposal · F9 Regional Cooperative Dining · F10 Public Data Center · F11 La Clinica Partnership · F12 The Future is at SOU · F13 Honors College of the Siskiyou · F14 ASSOU Student Townhall

Contingency Planning

Vitality Plan Contingency Options

We recognize that for a plan with all the complexities of the Southern Oregon University Vitality Plan, uncertainty in implementation carries a substantial amount of risk. The university intends to mitigate this risk as much as possible through monthly progress checks and financial updates, the utilization of a dedicated project manager in consultation with state government, and the development of a thorough and detailed implementation plan.

Even with the risk mitigation items above, we recognize the need for additional contingency options to weather unforeseen circumstances or additional headwinds. The following options are not currently included as items in the SOU Vitality Plan but can be considered if needed over the next twelve months as plan progress is monitored and evaluated.

GENERAL INSTITUTIONAL CONTINGENCIES

If enrollment falls materially below budget, and planned cost savings are insufficient, the university will implement contingency measures to preserve cash solvency, maintain essential academic and student services, and protect long-term institutional stability.

Actions may include further restrictions and additional spending controls, hiring and travel restrictions, requesting the use of available board-restricted reserves, contract renegotiations, and other cash-management measures. The university may also consider temporary furloughs, reduced schedules, additional separations, position reductions, or other personnel actions consistent with applicable law, board policy, labor agreements, and shared governance.

The university may also seek bridge funding or liquidity support through state treasury, philanthropic, grant-related, or other legally available sources. All actions will prioritize instructional continuity, student success, payroll and debt obligations, regulatory compliance, and the university's public mission.

SHORT-TERM BRIDGE FUNDING OPTION

Recognizing the volatility and sensitivity of enrollment on the budget for SOU, the Vice President of Finance and Administration has approached outside entities regarding the potential for short-term bridge funding. Two different organizations, one public and one private, have indicated that they would be available to help SOU in the short-term if bridge funding is needed to fill a gap of 60 days or less before additional state funding becomes available. SOU does not anticipate needing this emergency funding, considering the one-time funding provided by the state during the 2026 General Session through the Emergency Board process, but has these connections in place if needed.

THIRD PARTY BACK-OFFICE FUNCTION OPTION

The Option Path recommendations by Deloitte presented several options for savings in the administrative footprint of the institution. One involved the use of an institutional partner provider (likely one of the state's large universities), whereby a fee for service would be instituted, most current SOU Staff would be eliminated, and a smaller contingent would be hired by the partner institution. Another option would institute a consortium model for service delivery, likely with similar institutions



such as the other Technical and Regional Universities. This would have similar effects on current staff but would require the navigation of complex bureaucratic hurdles and according to Deloitte would likely require 12-18 months to implement, time that the current environment makes challenging at best.

The SOU Vitality Plan, for many of the institution's back-office functions, incorporates a self-generated staff reduction plan, which aims to achieve similar (or often higher) cost savings than the first two options, but puts many areas in a minimum acceptable service level for the university, and challenges every functional area to prioritize its workflows. If the new Vitality Plan-initiated service level is deemed unacceptable, or if additional savings must be achieved, a contingency option could utilize the third option offered by the Deloitte study.

The third option incorporates an alternative approach to back-office functions at the university using a third-party provider. The University President and Vice President of Finance and Administration held multiple informational meetings with a prominent national firm. The firm is currently preparing a proposal that would create a partnership for several functional administrative areas. To be clear, this option would involve the elimination of significant numbers of SOU staff and must be considered carefully before implementing. But if needed, it would likely generate additional savings.

ATHLETIC PROGRAMMING REDUCTION OPTION

The SOU Vitality Plan moves the university's athletic program away from dependence on significant Education and General Fund transfers for financial sustainability. The Plan incorporates a mix of cost reductions, revenue enhancements and philanthropic donations. While the donations are greatly appreciated, we recognize that they are time bound, extending out until summer 2029. SOU Athletics is planning on incorporating a new model of cost management and fundraising targets for each program.

That transition is expected to start as soon as possible, understanding that it may take time to incorporate the changes and build the donor base needed to establish new baselines for funding. If at any time during the next two years it appears as if the targets are not likely to be met, then difficult decisions will need to be made regarding specific athletic program reductions and possibly program eliminations. Program reductions and eliminations would achieve cost-savings but would also accompany a likely loss of students and student-generated revenue.

Financial Forecast

Discussion of Implementation Plan



Vitality Plan Implementation Schedule

Fiscal Year	Month	Activity	Expected Outcome
	June 2026	<ul style="list-style-type: none"> Faculty and staff reductions Legislative E-Board meeting 	<ul style="list-style-type: none"> Elimination of 3 faculty and 7 staff positions Reception of \$6.5 million in legislative support
FY 2026-27	July 2026	<ul style="list-style-type: none"> Faculty Curriculum Workshops Athletics transitions from General Fund support (2-year philanthropic glide path in place) Staff reductions Begin exploring shared-services opportunities with Oregon Public University partners 	<ul style="list-style-type: none"> Start to create structure and process for curriculum revisions Athletics becomes a self-sustaining auxiliary unit by July 1, 2029 Elimination of 10 staff positions Begin conversations regarding details of potential shared services
	August 2026	<ul style="list-style-type: none"> Continue Faculty Curriculum Workshops Staff reductions 	<ul style="list-style-type: none"> Complete structure and process for curriculum revisions Elimination of 1 staff position
	September 2026	<ul style="list-style-type: none"> Legislative E-Board meeting Launch Phase I of Curriculum Revision Process Faculty and staff reductions 	<ul style="list-style-type: none"> Reception of \$6.5 million in legislative support Engage faculty in programmatic visioning for Academic Cornerstones Elimination of 3 faculty and 9 staff positions
	October 2026	<ul style="list-style-type: none"> Continue Curriculum Revision Process Staff reductions 	<ul style="list-style-type: none"> Faculty continue in programmatic visioning for Academic Cornerstones Elimination of 2 staff positions
	November 2026	<ul style="list-style-type: none"> Complete Phase I of Curriculum Revision Process Staff reductions 	<ul style="list-style-type: none"> Curricular mapping of shared courses and streamlined programs of study Elimination of 1 staff position



	December 2026	<ul style="list-style-type: none"> Decision-point regarding potential shared services with Oregon Public University partnerships Faculty and staff reductions Farm at SOU becomes a self-sustaining auxiliary unit of the university 	<ul style="list-style-type: none"> Deadline to determine if potential shared partnerships are viable Elimination of 1 faculty and 4 staff positions The Farm at SOU no longer supported by General Fund
	January 2027	<ul style="list-style-type: none"> Launch Phase II of Curriculum Revision Process JPR Executive Director salary shifts to JPR Foundation Reduction of staff 	<ul style="list-style-type: none"> Engage faculty in course writing to revise and/or create new courses to map to the re-envisioned shared curriculum Decreased support of ED salary from General Fund Elimination of 1 staff position
	February 2027	<ul style="list-style-type: none"> Continue Course Writing in Curriculum Revision Process 	<ul style="list-style-type: none"> Faculty continue in course writing teams
	March 2027	<ul style="list-style-type: none"> Complete Phase II of Curriculum Revision Process Reduction of staff 	<ul style="list-style-type: none"> Standardized programs of study that include syllabus templates that outline the course objectives and topics Elimination of 2 staff positions
	April 2027	<ul style="list-style-type: none"> Finalize high-level programs of study documents 	<ul style="list-style-type: none"> Clearly expressed curriculum maps for every major
	May 2027	<ul style="list-style-type: none"> Create articulation maps for every major for transfer students New university catalog published 	<ul style="list-style-type: none"> Articulation curriculum maps for transfer students Students register in the new academic portfolio
	June 2027	<ul style="list-style-type: none"> Complete course syllabi for Fall 2027 Faculty and staff reductions 	<ul style="list-style-type: none"> All syllabi for Fall term are completed Elimination of 14 faculty and 5 staff positions
FY 2027-28	July 2027	<ul style="list-style-type: none"> AY 27-28 Admissions cycle starts with reduced remissions offerings Youth Programs becomes a self-sustaining auxiliary unit of the university 	<ul style="list-style-type: none"> Decrease offering of remissions to incoming first-year students Youth Programs no longer supported by General Fund



August 2027	<ul style="list-style-type: none">• Begin working out 3+1 and 4+1 streamlined program pathways	<ul style="list-style-type: none">• Clear pathways for accelerated baccalaureate and master's degrees
September 2027	<ul style="list-style-type: none">• Launch new interdisciplinary programs of study	

Next Steps

Accreditation Update

Accreditation Timeline

- [NWCCU Request for Response](#) (RFR) letter received February 18, 2026
- [SOU response to RFR](#) submitted on March 18, 2026
- [NWCCU response](#) received April 18, 2026
 - Asked for updates on info being shared with SOU Board, HECC, and Legislature
- Three subsequent updates sent 4.21; 5.1, and 6.11
- SOU team to meet with NWCCU board on 7.8.26
- 6.5 call with new NWCCU liaison Ed Harris Mid-cycle report pushed back to Fall of 2028
- Fall 2026 site visit will still happen but will focus on financials and recommendation four
- Mid-Cycle Evaluation Report due 9-1-26
- Mid-Cycle Site Visit October 2026

Accreditation Timeline

- Three subsequent updates sent 4.21; 5.1, and 6.11
- SOU team to meet with NWCCU board on 7.9.26
- 6.5 call with new NWCCU liaison Ed Harri Mid-cycle report pushed back to Fall of 2028
- Fall 2026 site visit will still happen but will focus on financials and recommendation four
- Our seven-year timeline remains on schedule
 - Fall 2028 mid-cycle report
 - Fall 2029 Policies, Regulations, Financial Report (PRFR)
 - Fall 2030 EIE report (Full Seven-Year Report)

Accreditation FAQs

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

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

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

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

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

Student Core Information System Replacement Project (CISR) Report

Workday Student Update






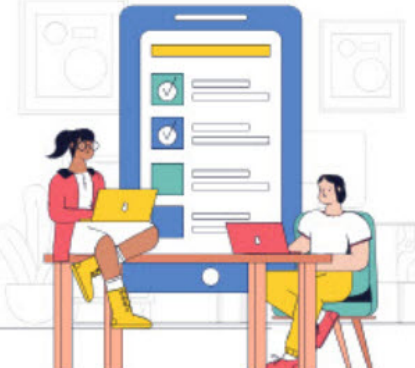

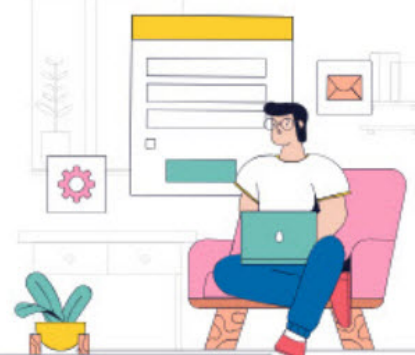

6/17/26

We're Live.....?!



Welcome to the “Messy Middle”!

Dueling Systems

	April – September	Legacy Systems*	
	<ul style="list-style-type: none"> • Work with an advisor. • Review academic history. • Identify courses meeting degree requirements. • Register for summer classes. • Apply for spring or summer graduation. 		
	<ul style="list-style-type: none"> • Find courses for fall term. • Build a schedule for fall term. • Register for fall courses. • Apply for fall graduation. 		
	<ul style="list-style-type: none"> • Request change of major. • Add a minor or certificate. • Pay tuition. • Manage financial aid. • Check grades. 		

*Legacy Systems = DegreeWorks, Student Registration & Planning, Faculty Services

Processes Moving to Workday

****** Spring and summer registration, payments, and grades will continue to be processed in Banner. ******



Current student onboarding, training, scheduling, advising and registration underway



Incoming first year students onboarding and registration; ongoing integration of key systems, especially student financials



All the things happen in Workday and **Workday is official system of record**

Summer Work



- Integration testing
- Custom report validation
- Data conversion
- Work study launch
- Curricular refinement
- Student financials integration
- Financial aid reconfiguration
- Security refinements
- User resource development

And on this note....



“

Can I just say that examining the student academics through Workday is freaking amazing?! Yesterday I got through everything I needed to review in less than a quarter of the time it would normally take me, and did it with greater confidence that I hadn't missed anything while scrolling. I think I'm in love with Workday now.

”

Future Meetings

Adjournment