OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

October 8, 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.

The committee will be asked to act on two items: SOU's 2026-2029 Educator Equity Plan and the 2027-2028 meeting schedule of the Academic and Student Affairs Committee.

There will be a provost's report including organizational updates, the statewide Provost's Council, and the Higher Education Coordinating Commission's university evaluation. The student affairs report will focus on various program highlights. There will be a recruitment, admissions, and financial aid report will consist of updates on fall enrollment and financial aid, a review of the admissions funnel, and part one of a discussion on transfer pathways and partnerships with community colleges, with a focus on Rogue Community College. An enrollment management report will include a general enrollment updates including student demographic data, as well as retention and student support.

Other Items on the agenda include an update on the SOU Vitality Plan as it pertains to SOU's Academic and Student Affairs, an accreditation update, a Student Core Information System Replacement Project (CISR) Report and a student and faculty highlight on the Community Resilience Leadership Program.

The meeting will occur as follows:

Thursday, October 15, 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/89816481198 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
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 or to submit their comments in writing at least 24 hours in advance of the meeting to the Board of Trustees email address: trustees@sou.edu. Public comments also may be delivered by hand or mailed to SOU Board of Trustees, 1250 Siskiyou Boulevard, Churchill Hall, Room 107, Ashland, OR 97520.

Board of Trustees
Academic and Student Affairs Committee Meeting

October 15, 2026

Call to Order / Roll / Declaration of a Quorum

Board of Trustees
Academic and Student Affairs Committee Meeting

Thursday, October 15, 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/89816481198

AGENDA

Persons wishing to provide live public comments in the meeting, or in writing, should sign up in advance at trustees@sou.edu.
Please note: agenda 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	Chair Iris Maria Chavez
	1.2	Roll and Declaration of a Quorum	Sabrina Prud'homme, SOU, Board Secretary
	1.3	Agenda Review	Chair Iris Maria Chavez
1:05 p.m.	1.4	Student and Faculty Spotlight: Community Resilience Leadership Program	Bret Anderson, SOU, Professor of Economics
1:15	**2**	**Public Comment**	
1:30	**3**	**Provost's Report**	Dr. Casey Shillam, SOU, Provost and Executive Vice President
	3.1	Organizational Updates	
	3.2	Provost's Council Update	
	3.3	Higher Education Coordinating Commission University Evaluation	
	3.4	SOU 2026-2029 Educator Equity Plan (Action)	Dr. Amanda Casto, SOU, School of Education Assessment and Accreditation Coordinator
1:50	**4**	**Student Affairs Report**	Dr. Carrie Vath, SOU, Assistant Vice President for Student Life & Dean of Students
	4.1	Program Highlights	
	5	**Recruitment, Admissions and Financial**	Ian Parent, SOU, Interim

Board of Trustees
Academic and Student Affairs Committee Meeting
Thursday, October 15, 2026
1:00 p.m. – 4:00 p.m. (or until business concludes)

AGENDA (Continued)

		Aid Report	Executive Director of Enrollment Services
2:05	5.1	Fall Enrollment Update and Review of Admissions Funnel	Ian Parent
2:15	5.2	Financial Aid Updates	Ian Parent
2:20	5.3	Transfer Pathways and Partnerships with Community Colleges (Part 1): Rogue Community College	Dr. Casey Shillam
	6	**Enrollment Management Report**	
2:35	6.1	Review of Enrollment and Student Demographic Data	Dr. Carrie Vath; Ian Parent
2:45	6.2	Retention and Student Support	Dr. Carrie Vath
	7	**Information, Discussion, and Action Items**	
3:00	7.1	SOU Vitality Plan Update: Academic and Student Affairs	Dr. Casey Shillam
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) Report	Hart Wilson, SOU, CISR Project Manager
3:55	7.4	2027-2028 Committee Meeting Schedule and Future Meetings (Action)	Chair Iris Maria Chavez
4:00 p.m.	**8**	**Adjournment**	Chair Iris Maria Chavez

Community Resilience Leadership Program

Public Comment

Provost's Report

Academic and Student Affairs Committee
Provost Report: October 15, 2026

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

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Organizational Updates

Academic Affairs

- Moving to Dean of Faculty model
  - Finalizing the Position Description
  - Search in Winter 2027
  - Appoint to start July 1, 2027
- IR moving to Business Intelligence Office

Enrollment & Student Affairs

- Search for AVP-ES
- Erin Beard: Director of Advising & Orientation

Statewide Provost's Council

Work on HB 4124

Collaboration versus Competition

General Education Summit

Executive Summary:
2025 Southern Oregon University HECC Evaluation Report

1. Institutional Mandate and Regional Economic Anchor

Southern Oregon University (SOU) operates under the statutory mandate of ORS 352.061, which requires the Higher Education Coordinating Commission (HECC) to evaluate the institution's contributions to statewide goals. Beyond this legislative requirement, SOU serves as the indispensable regional higher education anchor for the Rogue Valley, acting as a primary economic engine in a geographically isolated portion of the state. The university provides the critical infrastructure for workforce development, cultural vitality, and civic engagement that sustains Southern Oregon's prosperity. The scale of SOU's financial contribution is significant. According to a 2026 Econsult Solutions study, the university generates a total statewide economic impact of $730 million, which represents a remarkable 24-fold return on the state's $30.4 million operating investment. This impact is felt most acutely in the local region, where the university supports thousands of jobs and provides a substantial wage premium for its graduates.

Economic Footprint and Workforce Contribution

SOU's regional integration is exemplified by high-impact partnerships, including hosting the OHSU School of Nursing on the Ashland campus, collaborating with the Oregon Shakespeare Festival to drive the creative economy, and maintaining "2+2" pathways with Rogue Community College and Klamath Community College. However, the external value provided by these programs is currently threatened by severe internal fiscal pressures.

2. Financial Exigency and the Structural Transformation Strategy

SOU's fiscal position reached a critical threshold in 2025, necessitating a declaration of financial exigency on August 1, 2025. This strategic action was required to address a persistent structural deficit and to provide the administration with the authority to implement the radical restructuring necessary to preserve the university's solvency. The institution's financial health has been compromised by a widening gap between revenue and expenditures. In FY2025, SOU reported a $7.3 million operating deficit in its Education and General (E&G) fund. Over the preceding five-year trend, expenditures grew at an annual rate of 4.9%, while revenues grew by a negligible 0.9%. This imbalance has exhausted the university's liquid reserves, leaving the E&G fund balance at -1.1 months—a level that signals acute financial distress. To restore stability, SOU has implemented the Vitality Plan, which targets:

- A sustainable E&G budget cap of $60 million.
- $20 million in cost savings.
- A streamlined academic portfolio prioritized by student demand and regional workforce needs.

- Strategic state investments are critical to this transformation. The university is utilizing $1.1 million to migrate from the legacy Banner system to Workday, a move projected to save revenue. Additionally, a $323,000 website redesign is underway; this project is not merely cosmetic but a revenue-generation tool through improved recruitment efficiency. These fiscal corrections are a prerequisite for resolving the university's precarious standing with regional accreditors.

3. Accreditation Status and Governance Oversight

Institutional accreditation serves as the ultimate marker of operational viability. On August 5, 2026, the Northwest Commission on Colleges and Universities (NWCCU) placed SOU on probation due to concerns regarding its financial sustainability. This action was taken as part of our yearly review by the commission and, while not ideal, the commission has been aware of our financial situation since we alerted them back in February of 2026. They commended us for our openness and the actions that we've taken since that initial notification. The financial situation will be the primary focus or our site visit later this month. The Board of Trustees has exercised rigorous stewardship in response to this crisis. Meeting nine times in 2025—more than double the statutory requirement—the Board has taken decisive actions, including:

- Authorizing the sale of excess university property to generate immediate liquidity.
- Implementing strict monitoring of the Vitality Plan's performance metrics.
- While governance oversight is heightened, the university's long-term recovery is inextricably linked to its ability to stabilize student enrollment and success outcomes.

4. Student Access, Enrollment Trends, and Success Outcomes

SOU is navigating a challenging divergence in enrollment patterns. While the Fall 2025 headcount of 5,206 reflects a 16% drop since Fall of 2016 the Full-Time Equivalency (FTE) has decreased at a higher rate (27%) over that same timeframe. Essentially, we have fewer students than ten years ago and those students are taking fewer credits on average. This creates a severe structural crisis: the university's fixed costs, including tenured faculty and campus infrastructure, were built for the headcount of a decade ago, but institutional revenue is derived from the much smaller and shrinking FTE of 2025. This is exacerbated by a student body that is now 51.8% part-time.

Student Success Indicators (Fall 2018 Cohort)

Student Group	1st-Year Retention	6-Year Graduation Rate
All Students	73%	45.5%
Transfer Students	N/A	65.5%
Underrepresented Minorities	68.5%	37.7%
Pell Grant Recipients	70.9%	40.5%

The 65.5% graduation rate for transfer students stands as a primary institutional differentiator. This success underscores SOU's effectiveness as a "transfer-friendly" institution, though the

lower 45.5% graduation rate for direct-entry freshmen highlights the urgent need for enhanced support for traditional students to prove the university's value proposition.

5. Affordability and Cost Efficiency Analysis

Oregon's statewide goal of affordable access is under pressure at SOU. Resident tuition and fees have increased at an average annual rate of 5.1%, reaching $13,298. A positive counterweight is the "affordability risk rate," which improved to 44% in 2023-24 (down from 57% a decade ago), reflecting the impact of increased institutional and state aid. This was slightly below the statewide rate of 45%. The changes outlined in both the resiliency and vitality plans should help bring the total staff FTE in line with the decreases in student FTE.

Concluding Statement:

Southern Oregon University remains a vital economic and educational engine for the region, generating approximately $730 million in statewide economic impact, supporting over 4,000 jobs, and retaining over 70% of resident graduates in the Oregon workforce five years after graduation. While the university maintains active institutional and specialized accreditations, the NWCCU placed SOU on probation in August 2026 due to financial sustainability concerns, placing long-term financial viability and restructuring plans at the center of institutional monitoring. This financial pressure extends to student costs: resident undergraduate tuition has risen 56% since 2016–17 to $13,298 (a 5.1% average annual growth rate), though SOU's overall affordability rate of 44% remains slightly better than the statewide average.

At the same time, enrollment and student outcome metrics highlight both operational challenges and key academic strengths. Although overall headcount saw a modest increase to 5,206 students in Fall 2025, full-time equivalent (FTE) enrollment has fallen 27% since Fall 2016 (down to 3,150.2), driven in part by a drop in newly admitted undergraduates from 975 in Fall 2023 to 809 in Fall 2025. In terms of academic success, SOU demonstrates strong transfer outcomes with a 65.5% four-year transfer graduation rate. However, persistent equity gaps remain for direct-entry, underrepresented minority, and Pell Grant-eligible students in both first-year retention (73.0% overall vs. 68.5% for underrepresented minorities) and six-year graduation rates (45.5% overall vs. 37.7% for underrepresented minorities), underlining the need for targeted retention and completion strategies.

HECC Evaluation

Regional Economic Driver: SOU generates a **$730 million statewide economic impact**—including $532.5 million in southern Oregon—supporting 4,060 jobs and yielding an estimated $362.6 million annual wage premium for its Oregon alumni.

Declaration of Financial Exigency: Facing long-term structural deficits, SOU **declared financial exigency on August 1, 2025**. Through the **Vitality Plan**, the university aims to lower its Education & General (E&G) budget and achieve **$20 million in cost savings**.

HECC Evaluation: https://www.oregon.gov/highered/public-engagement/Documents/Commission/Full-Commission/2026/6-October%207,%208/7.1c%20-%202025%20University%20Evaluation%20-%20Southern%20Oregon%20University%20(SOU)%20(ORS%20352.061).pdf

HECC Evaluation

Divergent Enrollment Trends: Total headcount remained stable at **5,206 students in Fall 2025**, but Full-Time Equivalent (FTE) enrollment dropped **27% from Fall 2016 (4,293 FTE) to Fall 2025 (3,150 FTE)**, driven by a high proportion of part-time and non-traditional students (51.8% part-time).

Student Retention & Transfer Success: SOU achieved a **73.0% first-year retention rate** and a **45.5% six-year graduation rate** for direct-entry undergraduates. Transfer students performed significantly better, with a **65.5% four-year transfer graduation rate**.

HECC Evaluation

Rising Student Costs vs. Improved Affordability: Resident undergraduate tuition and fees rose **5.1% annually to $13,298 in 2025-26** (above the 4.5% statewide average).

State-Funded Operational Restructuring: Oregon provided targeted sustainability funding to support SOU's administrative modernization, including replacing Banner with Workday and updating the university website to boost recruitment.

SOU 2026-2029 Educator Equity Plan (Action)

The 2026 - 2029 Educator Equity Plan at Southern Oregon University

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Background

- HECC has sponsored SOU's biennial Educator Equity Grant since 2016.
  - Past focus goals: culturally responsive teaching, mentorship, support culturally/linguistically diverse student pipelines (e.g., Pirates to Raiders), tribal nations liaison
- 2024-2026 Focus Goal: Recruitment of Native educator candidates: Develop trusting relationships with Tribal Nations and Indigenous Students
- 14 months to hire PNEC (September 2025)
- Spent approved funds on improving educational technology in EP classrooms to improve distance learning (Summer 2025)

SOU's Ed Equity Community of Practice

Tanya Blakeley
Licensure Coordinator
SOE

Amanda Casto
Educator Equity Grant PI
SOE

Miaya Dombroski
Clinical Placement
Coordinator, SOE

Kelly LaChance
Pathways for Native
Educators Coordinator, SOE

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The 2026 - 2029 Plan: Two Strategies

SOU Pathways for Native Educators

Focus Goal: To strengthen SOU's relationships with Oregon's nine tribes and the tribal nations of Northern California to recruit more Native students into SOU's educator preparation pathways.

Statewide EPP Collaboration

Focus Goal: To design and implement mentoring systems between EPPs and CTs to improve retention, belonging, and preparation for racially, ethnically, and/or linguistically diverse teacher candidates.

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SOU Pathways for Native Educators
Strategy #1

- Continuation/reiteration of similar strategies from previous grant cycles since 2020
- Building relationships with Oregon and northern CA tribes takes **time**, **consistency**, and **commitment**
- Ongoing communication efforts with Oregon tribes and community colleges
- Establish a presence within SOU's Native American Student Union (NASU)

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SOU Pathways for Native Educators
Immediate Timeline (2025-2027 AYs)

- **2025-2026:** Onboard new PNEC (Kelly LaChance). Conduct initial outreach to tribal communities across Oregon and northern CA and participate in NASU.
- **October - November 2026:** Active Recruitment
  - Focus: Build relationships and generate referrals.
- **December 2026 - January 2027:** Follow-Up & Engagement
  - Focus: Move students toward next steps and support currently enrolled students.
- **February - March 2027:** Evaluate & Strengthen
  - Focus: Understand what is working and strengthen the pipeline.
- **April - June 2027:** Next-Step Support
  - Focus: Support students as they move forward.

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SOU Pathways for Native Educators
Markers of Success (June 2027)

- Tribal partners understand SOU's educator pathways and know how to connect interested students with the program.
- Community colleges become ongoing recruitment and referral partners of Native students.
- Currently enrolled Native students have stronger connections to staff, resources and supports.
- More prospective Native students move from awareness and interest toward application and enrollment.

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Statewide EPP Collaboration: CT Mentorship Strategy #2 Status

2025-2026 AY: EPPs met monthly to discuss observations
May 2026: Education NorthWest (EdNW) contracted by HECC to facilitate 2026-2027 collaboration
September - October 2026: CT Needs Assessment
October 29, 2026: Educator Equity CoP Convening (develop shared plan)
November 2026: HECC will present joint plan to ODE

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2026 - 2029 Grant Budget

- The HECC has been steadily supporting the efforts of this grant work since 2016 (approximately $75k per fiscal year)
- Budget items for **Strategy #1** primarily include: 0.5 FTE PNEC position, stipends for statewide travel, student materials, and administrative costs.
- Budget items for **Strategy #2** primarily include the $25k that is earmarked for future work (based on needs assessment currently being conducted)

Questions or Comments?

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Educator Equity Plan 2026-2029

Submitted to the Southern Oregon University Board of Trustees

October 2026

Prepared by

Southern Oregon University: Education Department

Amanda R. Casto, Ph.D.
Assessment & Accreditation Coordinator: School of Education
Educator Equity Grant P.I.

DRAFT

Cover Letter – University Board Approval Pending

The School of Education at Southern Oregon University (SOU) is pleased to submit this proposal for continued Education Equity funding. Acting on delegated authority by the Board of Trustees of Southern Oregon University, President, Bailey has reviewed this plan for "adequacy and feasibility" and approves its submission to the HECC. The Board of Trustees also will ratify this action at the next regular meeting of the Board of Trustees or sooner if practicable.

We extend our appreciation to the Higher Education Coordinating Commission (HECC) and the Educator Advancement Council (EAC) for their ongoing commitment to the diversification of our teachers in the State of Oregon.

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President Richard J. Bailey, Jr., Ph. D. Date

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Southern Oregon University's Land Acknowledgment

We acknowledge that Southern Oregon University is located within the ancestral homelands of the Shasta, Takelma, and Latgawa peoples who lived here since time immemorial. These Tribes were displaced during rapid Euro-American colonization, the Gold Rush, and armed conflict between 1851 and 1856. In the 1850s, discovery of gold and settlement brought thousands of Euro-Americans to their lands, leading to warfare, epidemics, starvation, and villages being burned.

In 1853 the first of several treaties were signed, confederating these Tribes and others together – who would then be referred to as the Rogue River Tribe. These treaties ceded most of their homelands to the United States, and in return they were guaranteed a permanent homeland reserved for them. At the end of the Rogue River Wars in 1856, these Tribes and many other Tribes from western Oregon were removed to the Siletz Reservation and the Grand Ronde Reservation. Today, the Confederated Tribes of Grand Ronde Community of Oregon and the Confederated Tribes of Siletz Indians are living descendants of the Takelma, Shasta, and Latgawa peoples of this area. We encourage YOU to learn about the land you reside on, and to join us in advocating for the inherent sovereignty of Indigenous people.

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University Mission and Alignment with the Equity Lens

Vision

Southern Oregon University will become an inclusive, sustainable university for the future that guides all learners to develop the knowledge, capacities, and audacity to innovate boldly and create lives of purpose.

Mission

Southern Oregon University is a regionally-engaged learning community committed to being the educational provider of choice for learners throughout their lives.

- We inspire curiosity and creativity, compel critical thinking, foster discovery, and cultivate bold ideas and actions.
- We achieve student success, professional preparation, and civic engagement through service excellence, evolving technologies, and innovative curriculum.
- We foster access, equity, inclusion and diversity in thought and practice.
- We prepare our learners to be responsible, engaged citizens in our democracy.
- We promote economic vitality, sustainability, cultural enrichment, and social well-being in our region, the state, the nation, and the world.

SOU Values

- The well-being and success of all learners
- Critical thinking, discovery, and engaged learning
- Equity, diversity, and inclusion
- Creativity and collaboration
- Excellence, continuous improvement, and accountability
- A healthy, safe, and civil campus
- Economic vitality and environmental sustainability
- Improving our community, region, and world

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Oregon's Education Equity Lens "...was adopted by the Higher Education Coordinating Commission (HECC) in 2014 as a cornerstone to the State's approach to education policy and budgeting" (HECC 2024a). Southern Oregon University (SOU) embodies *Oregon's Education Equity Lens* by implementing initiatives and practices aimed at promoting equity, diversity, and inclusion across its campus community. This includes efforts to increase access to higher education for historically marginalized groups, creating a welcoming and inclusive campus environment through affinity groups, multicultural events, and the promotion of diverse curricular perspectives.

Foundational to the Equity Lens is a series of belief statements. SOU's Education Department endorses and supports the entire Equity Lens. The belief statements excerpted below are particularly relevant to the work we do in educator preparation and to the Focus Goal of our Educator Equity Plan:

> We believe that [...] we demonstrate our priorities and our commitment to communities of color, learners experiencing poverty, and other underserved communities, in the ways we allocate resources and make educational investments. We believe in focusing postsecondary education and training resources to serve Oregonians where they are and who they are, with a priority on communities and populations that have been historically underserved.
>
> We believe that communities, students, parents, educators, and community-based organizations have unique and important solutions to improving outcomes for our students and educational systems. Our work will only be successful if we are able to truly partner with these partners, engage with respect, authentically listen, and have the courage to share decision-making, control, and resources.
>
> We believe in the critical importance of culturally responsive teaching and workforce diversification. An equitable education system requires providing educators with the tools and support to meet the needs of each student, and a dedicated effort to increase the culturally and linguistically diverse educators who reflect Oregon's rapidly changing student population. Our institutions of postsecondary education and training, and the P-20 system, will truly offer the best educational experience when their faculty, staff and students reflect this state, its growing diversity, and the ability for all of these populations to be successful in their educations and ultimately in their careers. (HECC, 2024)

Native American/Alaska Native Students

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One of the historically underserved populations that SOU is committed to better serving is Native American/Alaska Native students. SOU is committed to increasing access and retention as well as to reducing systemic barriers for these students. Since the last funding cycle of the Educator Equity Grant, SOU has added a Native Nations Liaison position to our university leadership structure. The role is dual in nature: In addition to serving our student body, the Native Nations Liaison also leads SOU in intentionally and explicitly engaging with tribal nations as sovereign governments.

SOU offers a number of different programs designed to support future and current Native students. We offer both a minor and a certificate in Native American Studies (NAS). The NAS program is interdisciplinary by design and includes two full-time faculty members with dedicated lines and three additional faculty from related programs like Anthropology, English, and History.

SOU hosts an annual Indigenous People's Day Celebration to honor Native American cultural identity and heritage, and builds awareness of the historic and continued presence of Indigenous peoples in North America and in the Rogue Valley. This large event is open to the whole community and includes dancers, drummers, a salmon lunch and more.

The Southern Oregon University Honors College offers Native students an opportunity to apply for the Tribal Nations Honors Scholar program. The program offers mentorship from Native American students and faculty, opportunities to "Take the Lead" on issues that matter, mentor incoming Tribal Scholars, represent their Tribal nations as a Tribal Honors Scholar, and receive additional funding in support of travel and or training.

The Native American Student Union hosts the annual SOU Powwow which is the largest student led event on the SOU campus. The SOU Powwow has been held annually for 31 years and brings together both Native and non-Native community. It is a social gathering that provides the Native community an opportunity to come together to socialize and honor their culture through traditional song and dance. The powwow also provides the non-Native community an opportunity to learn about Native cultures.

For over 25 years, SOU has offered an on-campus residential academic camp for middle school and high school Native American students – *Konaway Nika Tillicum*, which means "All My Relations" in Chinook Trade Jargon. This event is an eight-day academic program exploring a broad range of classes, lectures, cultural experiences, and recreational activities for Native American students. This program provides not only an enriching and supportive camp experience, but also an introduction to our campus and to college life as well.

In recognition of Tribal sovereignty and that Native students attend SOU as Tribal citizens; the Native American Student Union has a dedicated Native Nations Gathering House on campus

that serves as a dedicated meeting space for Native students and guests. This space also provides Native students with a space for mentorship and community. The Native Nations Liaison position on campus has provided much needed focus, energy, and support for SOU's Indigenous students. This position has provided opportunities to expand existing cultural events and build a sense of belonging and connection to support the mental, emotional and spiritual needs of SOU's Native students.

In keeping with the work being done on the campus as a whole, the Education Department is committed to increasing the number of Native educators in Oregon public schools. Increasing the diversity of our educator preparation programs and recruiting more Indigenous education students will require us to leverage all of the resources described above. Educator Equity Grant funding not only helps us recruit Native teacher candidates, but also better connect Native preservice educators to the Native community on campus and to campus supports. Community, trust and a sense of belonging are paramount to student retention and to educator persistence.

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Overview of SOU's School of Education (SOE)

Mission Statement

We prepare caring, capable educators and transformative leaders, building sustainable futures in the communities we call home.

The SOU Education Department offers the following programs:

Degree/Program	Licensure	Endorsement
BA/BS: Early Childhood Development		
BA/BS: Education Studies: Holistic Education Concentration		
BA/BS: Education Studies: Child and Family Advocacy & Wellness		
BA/BS: Education Studies: Multiple Subjects Initial Licensure	Initial	Elementary Multiple Subjects
BA/BS: Education Studies: SPED Initial Licensure	Initial	Special Education (SPED): Generalist
MSEd: Leadership in Early Childhood Education		
MSEd: Various concentrations		
Master of Arts in Teaching	Initial	Special Education (SPED): Generalist, Elementary Multiple Subjects, Math, Biology, Physics, Chemistry, Integrated Science, Social Studies, English Language Arts, Health, Physical Education, Art, Music, Drama, Business, World Language
Principal Administrator License (PAL)	Advanced	PAL
Reading Intervention Endorsement	Added Endorsement	Reading Intervention
Special Education Endorsement	Added Endorsement	SPED: Generalist
Undergraduate Degree + Teaching License Programs		
Degree/Program	**Licensure**	**Endorsement**

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Health& Exercise Science + Single Subject License	Initial	Health/PE
Math + Single Subject License	Initial	Math
Spanish + Single Subject License	Initial	World Language: Spanish
Minors, non-licensure certificates and microcredentials		
Minor in SPED		
Minor in Education Studies		
Adult Education Certificate		
Early Childhood Education Certificate		
Holistic Education Certificate		

Rural and Remote Access

A major focus of SOU's educator preparation programs continues to be improving access and removing barriers to becoming licensed teachers: particularly for rural teacher candidates. The region served by Southern Oregon University includes communities from the Central Oregon Coast (Coos Bay) south to the California border (Brookings) all the way to the rural areas southeast of the Cascades (Klamath Falls, Lakeview). Our students may commute from as far away as Roseburg to the north and Yreka to the south. Increasingly, we serve students who cannot commute and attend class at a distance. While there is some variation in socio-economic level, most of our students are reliant on financial aid to cover the expenses of a teacher preparation program and nearly all also need to maintain some level of employment to support themselves and their families.

The rural teacher shortage is acute and persistent. According to TSPC's *Oregon Educator Data Dashboard*, during the 2023-2024 school year, there were 428 teachers on restricted or emergency licenses in the six counties surrounding SOU. Of those, only 124 were in Jackson County and therefore within easy driving distance of our campus (TSPC, 2024).

Beginning with the 2023-2024 academic year, SOU now offers all of our preliminary, educator licensure programs via remote technology as well as in-person classes. Students who live and work in rural Oregon can earn their degrees and teaching licenses *without* leaving their home communities. This is particularly important for rural, Native educators who may be teaching on a restricted license as well as completing a degree and educator licensure program. This model has helped rural school districts with staffing shortages while still providing a high-quality, supportive educator preparation program to rural teacher candidates.

DRAFT

For undergraduate students, we do this in partnership with ten community colleges throughout Oregon and Northern California. Students are able to complete their general education requirements and prerequisite coursework at their local community colleges and then transfer to SOU to complete their upper division classes as well as student teaching. Upper division and licensure classes are offered either asynchronously online or via Zoom. Similarly, our MAT students who live outside the Rogue Valley can access their graduate coursework from a distance and student-teach in their home communities.

There are several fully-online institutions with a teacher education footprint in Oregon. Those programs may be appealing in terms of convenience and flexibility. However, SOU provides more comprehensive, humane and specific supports than online institutions can do. This allows us to continue to make the case to prospective Native students that distance will not be a barrier to becoming a teacher and that SOU cares about their education, careers and communities.

SOU also hopes to support Native students in maintaining their traditional familial, community, and cultural connections. SOU recognizes the significant role that family plays in the success of Native students (American Indian College Fund, 2021, p.11). Therefore, SOU seeks to support these students in maintaining traditional familial and community connections and "to imagine and frame their futures and possibilities in a healthy, positive, culturally appropriate way" (p. 7). We also hope that this model will support tribes as they seek to grow their own teaching workforce in tribal communities and serve to strengthen trust and relationships between SOU and Native communities in Oregon.

Southern Oregon University's Educator Equity Plan

Past Biennium

SOU's 2024-2026 Educator Equity Plan was based on two primary strategies:

1. Recruitment of Native Educator Candidates
2. Incorporate Tribal History/Shared History course into SOU's Master of Arts in Teaching Program Redesign

Strategic Goal #1: In 2020, SOU's School of Education identified the recruitment and retention of Native American/Alaska Native students in our educator preparation pathways as a focus area for improvement. Since then, each biennial educator equity plan has included strategies related to increasing our recruitment, retention, and support of Native teachers across the

region. While strategic goals were robust, external and structural factors created operational delays:

- Administrative Transitions: The SOE experienced rapid leadership turnover between 2022 and 2024.
- Extended Recruitment Search: The plan depended on hiring a Pathways for Native Educators Coordinator (PNEC)—a 0.5 FTE grant-funded position designed to build educator pipelines through Tribal partnerships, engage Indigenous Oregonians, and promote SOU's flexible and distance-learning licensure options. Finding the ideal candidate for this specialized role took longer than anticipated and was finally fulfilled after a 14-month search.
- Interim Leadership: During the hiring process, SOU Tribal Nations Liaison Kenwani Kravitz embedded key equity goals into her broader campus-wide mission of supporting Native students.

Building trusting and long-lasting relationships requires time and consistency. In September 2025, Kelly LaChance was appointed as the SOE's PNEC and initiated direct outreach across the region. As the fourth individual to lead this effort since 2020, LaChance has prioritized leadership stability and sustained communication, which are essential for building trust with Tribal community partners. Over her first year, LaChance focused on introductory outreach and inviting Tribal community members and regional community colleges to explore SOU's educator preparation pathways. This consistent engagement has established a solid foundation to expand collaborative partnerships with Tribal entities. Now that a foundation is being established, the partnerships between SOU's EPP and our tribal partners can begin to flourish.

Strategic Goal #2: The secondary goal from the 2024-2026 biennium was focused on redesigning a course (ED 355 *Teaching Native America*) focused on *Tribal History/Shared History* (Oregon Senate Bill 13) and embedding it within SOU's redesigned MAT program.

Curriculum redesign began as scheduled, but progress was paused in 2025 and early 2026 due to university-wide strategic initiatives (SOU's Resiliency Plan and Vitality Plan) that required the SOE and Native American Studies Program to defer major program modifications. While full course integration remains on hold, required *Tribal History/Shared History* content continues to be taught in existing methods coursework, specifically ED 458: *Social Science Methods* and MAT 528A: *Integrated Methods: Social Science/Arts.*

A New Biennium: Building on a Foundation in 2026-2029

SOU's Focus Goal for 2026-2029: Strengthen SOU's relationships with Oregon's nine tribes and the tribal nations of Northern California to recruit more Native students into SOU's educator preparation pathways.

Purpose and Logic

The underrepresentation of Native American educators within the American education system remains a pressing issue that undermines both cultural diversity and educational self-determination for tribes. According to the National Indian Education Association, "Ninety-three percent of the 650,000 American Indian, Alaska Native, and Native Hawaiian students in schools across the United States attend public schools" (National Indian Education Association, 2024, p.1). The National Indian Education Association also stresses that, "From early childhood through postsecondary education, Native students must have access to programs and resources that provide them the best chance at success" (p.1).

To reiterate its significance, it is important to note here that Native teachers are underrepresented in our teaching workforce just as Native students are underrepresented in higher education (National Center for Education Statistics, 2020). Less than 1% of Oregon educators identify as American Indian/Alaska Native (Educator Advancement Council, 2024). In 2022, the number of Native teachers that would have been required to close the diversity gap between Native students and Native educators was 245 in Oregon alone (Educator Advancement Council, 2022a).

Thus, our primary goal from 2024-2026 remains the same: to recruit Native American/Alaska Native students to SOU; specifically, to our educator preparation programs. This aligns with the objective outlined in Oregon's American Indian/Alaska Native Student Success Plan 2020-2025:

> Increase the number of AI/ AN identified teachers, paraprofessionals, and administrators employed in early learning, school districts, and post-secondary institutions at a rate comparable to that of Oregon's AI/ AN student population. (Oregon Department of Education, 2020a, p.16)

It also aligns with the work of the Educator Advancement Council's *Tribal Nations Educator Collaborative* work (Educator Advancement Council, 2022a). An important first step toward successful recruitment of Native students is to build relationships and trust with sovereign tribal governments, with Native communities, with prospective students, with school districts and with our community college partners.

Oregon's *American Indian/Alaska Native Student Success Plan* also asks Oregon institutions to:

> Support the development of transparent and streamlined pathways from community colleges to university teacher preparation programs [and to] to help AI/AN students navigate the complicated journey through preparation, licensure, job search and employment in Oregon's educator workforce. (Oregon Department of Education, 2020, p.16)

Building upon foundational efforts established across grant cycles since 2020, this focus goal represents a deliberate continuation and iteration of SOU's long-term commitments to Native educator recruitment and retention. Meaningful partnership with Tribal nations across Oregon and Northern California cannot be rushed; establishing deep, reciprocal trust requires sustained time, consistency, and institutional commitment over multiple years.

To expand educator preparation pathways for Native teachers, the School of Education maintains structured, ongoing communication efforts with Oregon Tribes, regional Tribal education departments, and community college partners. These external outreach channels ensure prospective Native students receive consistent guidance and support as they transition into SOU's educator preparation programs.

Complementing regional outreach, internal community-building remains central to candidate retention. In her role as PNEC, LaChance is actively establishing an ongoing presence within the Native American Student Union (NASU) on campus. By collaborating directly with NASU, the program provides culturally responsive mentorship, fosters peer networks, and ensures Native educator candidates feel connected, visible, and supported throughout their academic journey.

Strategies

Under the leadership of the Pathways for Native Educators Coordinator, SOU's School of Education is executing a comprehensive recruitment and student engagement framework starting with the 2026–2027 academic year to expand access to teaching careers and build a sustainable pipeline of Native educators across Oregon and Northern California. To achieve these goals, SOU is centering its efforts on five core strategies:

1. **Expanding Regional Tribal Partnerships.** SOU is strengthening direct relationships with all nine federally recognized Tribes of Oregon while expanding outreach to Tribal communities across Northern California. By establishing designated point-of-contact networks within Tribal education, workforce development, and higher education departments, the program maintains consistent communication, participates in Tribal community events, and creates clear, reciprocal referral channels for prospective candidates.

2. **Strengthening Community College Feeder Networks.** Recognizing two-year institutions as vital transfer bridges, SOU is building targeted partnerships with priority community colleges across Oregon and Northern California. Program leads collaborate directly with campus advisers, faculty, and Indigenous student program staff to highlight educator licensure options, deliver tailored pathway information, and establish reliable referral pipelines for Native transfer students.

3. **Standardizing the Recruitment and Referral Infrastructure.** To eliminate administrative friction, SOU has streamlined its recruitment system by developing a clear, annual information package and an accessible referral process. This centralized infrastructure provides Tribal education departments, advisers, and community partners with up-to-date program details, funding opportunities, and direct admissions connections, enabling partners to effortlessly connect prospective students with SOU staff.

4. **Delivering Holistic Student Engagement and Retention Support.** SOU combines personalized prospective student recruitment with active retention efforts for currently enrolled Native candidates. Staff hold individual meetings with prospective students to walk them through licensure pathways, financial resources, and next steps. Simultaneously, staff regularly connect with currently enrolled Native education students to assess their ongoing needs, connect them with academic and culturally responsive supports, and foster the community connection required for persistence and graduation.

5. **Implementing Data-Driven Tracking and Pipeline Evaluation.** To ensure program accountability and continuous improvement, SOU is establishing formal tracking and benchmark systems. By gathering baseline data on outreach sources, meeting counts, application statuses, and enrollment rates, the PNEC and SOE leadership will conduct monthly and quarterly reviews to identify successful recruitment channels, address geographic coverage gaps, and continuously refine strategies for long-term impact.

SOU's Secondary Focus Goal: Participation in a Collaborative Statewide Educator Equity Plan

Purpose and Logic

At the conclusion of the 2024–2025 academic year, Southern Oregon University (SOU) joined five other Oregon public universities with educator preparation programs to establish a unified statewide goal: designing and implementing mentoring systems that elevate retention, belonging, and preparation for racially, ethnically, and linguistically diverse teacher candidates.

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This collective commitment forms the cornerstone of our shared 2026–2029 Educator Equity Plan, which centers on five core objectives:

1. **Develop Shared Mentoring Frameworks:** Build culturally responsive mentoring tools and frameworks aligned with state and national standards.
2. **Recruit and Retain Diverse Cooperating Teachers (CTs):** Partner with school districts to recruit and retain culturally and linguistically diverse CTs through affinity-based mentoring strategies.
3. **Provide Targeted CT Training:** Design and deliver specialized professional development for CTs centered on instructional coaching, equity, and mentoring best practices.
4. **Advocate for Systemic CT Support:** Collaborate with state agencies and school districts to advocate for a coordinated system of compensation and institutional support for CTs.
5. **Evaluate Program Impact with Shared Metrics:** Measure mentoring effectiveness across all six public institutions using unified data points, including candidate feedback, CT experiences, and candidate completion and licensure rates.

Throughout the 2025–2026 academic year, SOU School of Education staff actively participated in collaborative statewide planning sessions to establish the operational foundation for this plan. As part of these efforts, our team engaged in research into university-district relationships, gathering real-time data on school district perceptions, hosting priorities, CT support and incentives, and future communication strategies.

The forthcoming 2026–2029 Educator Equity Plan, which will be presented by the Higher Education Coordinating Commission (HECC), serves as both an actionable blueprint and an enduring record of our shared statewide work to strengthen mentor networks and build a diverse, resilient educator workforce across Oregon.

Strategies

Throughout the 2025–2026 academic year, leadership from Oregon's public EPPs met monthly to analyze field observations, discuss regional challenges, and share insights regarding university-district partnerships. These ongoing sessions established a shared understanding of systemic gaps in mentor support, Cooperating Teacher (CT) retention, and teacher candidate preparation across the state. The following phases are critical to ensuring success:

- **Phase 1: Facilitation and Coordination Infrastructure:** To ensure cohesive coordination across institutions, the Higher Education Coordinating Commission (HECC) contracted

Education Northwest (EdNW) in May 2026 to facilitate the statewide collaboration. EdNW provides structural leadership, meeting facilitation, and project management support to guide EPP teams through the development and execution of the shared 2026–2027 strategic deliverables.

- **Phase 2: Statewide Cooperating Teacher Needs Assessment:** During September and October 2026, EPPs and EdNW are administering a comprehensive CT Needs Assessment across Oregon school districts. This statewide assessment gathers real-time data on district hosting priorities, partner expectations, compensation models, and the specific training and support required to recruit and retain high-quality, culturally diverse cooperating teachers.

- **Phase 3: Plan Synthesis at the Educator Equity CoP Convening:** On October 29, 2026, representatives from participating EPPs, school districts, and state agencies will gather for the Educator Equity Community of Practice (CoP) Convening. Using findings from the CT Needs Assessment and monthly EPP discussions, attendees will collaborate to finalize the specific objectives, metrics, and action steps that comprise the joint 2026–2029 Educator Equity Plan.

- **Phase 4: State-Level Governance and Presentation:** In November 2026, HECC will formally present the finalized joint Educator Equity Plan to the Oregon Department of Education (ODE). This presentation will establish a unified statewide roadmap for policy advocacy, resource allocation, and program implementation, locking in a collective framework to improve diverse teacher candidate retention across Oregon.

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Southern Oregon University's Educator Equity Plan Budget 2026-2029

This budget accounts for an estimated $75,000 to be available each fiscal year ($17,500 each quarter) starting in July 2026.

SOU's Annual Educator Equity Budget, 2026-2029					
Category	**Item**	**Description**	**Schedule**	**Total Amount**	**Percent Of Grant Total**
Strategy 1: Recruit Native students into Educator Preparation Programs					
Personnel	0.5 FTE position	Pathways for Native Educators Coordinator	$29,605.00 annually (est.)	$88,815	39.5%
Materials	SOU-branded recruitment materials	Flyers, SOU-printed merchandise, food for in-person events	$5,000 annually	$15,000	6.7%
Travel (PNEC & recruitment volunteers)	Flights, car rental, gas, accommodations, food, event registrations	Travel to tribal events, conferences, recruiting trips, and in-person CoP convenings	Distributed as needed	$15,000	6.7%
Strategy 2: Statewide Collaboration Educator Equity Plan					
		Earmarked for joint Oregon EPP plan	One time	$25,000	11%
Stipends	Four CoP members	Monthly meetings, two in-person convenings (Fall 2026 & Spring 2027)	$1,000 one-time payment	$4,000	1.8%
Travel	Four CoP members	Flights, rental car, gas, food for two in-person CoP convenings & meetings	Distribute as needed to max	$6,000	2.7%
Administrative Costs					
Personnel	Grant PI	5.25% salary	$265.12 monthly (est.)	$9,545	4.25%
Indirect Cost Recovery	Administrative		One time	$22,550	10%
Totals					
			Planned Spending for 2026-2029	**$185,910**	**82%**
			Budget for 2026-2029	$225,500	100%

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Student Affairs Report

Student Affairs Report

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

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

Dr. Carrie Vath
October 15, 2026

Belonging in Action: Veteran's Resource Center

- AY2025-2-26: Sent 2,250 email communications and 86 text messages
  - Part of mid-term check-ins and new student VA conversations (Campaigns in Navigate360)
- Total In-person Service Encounters: 1,578 (↑14% from 1380 in FY 24/25)
- Annual Unique Individuals: 227 (↑56% from 146 unique individuals)
  - Of those, 66 were Veterans, 50 were dependents using VA benefits, and 9 were members of the National Guard.

- New Student BBQ ~ 15 students attended

Southern OREGON UNIVERSITY

New Student Orientation & Weeks of Welcome

- Week of Welcome Programs (# of Student Participants):
  - HydroHunt ~225
  - Movie Night ~ 200
  - Meet Your Major ~ 150
  - Ice Cream Social ~ 250
  - BBQ ~ 150
  - Sunday Excursions ~ 210
  - Food Pantry Bingo ~ 120
  - Pop Culture~ 50

- GlowFest ~ 300 students attended
- Meet Ashland had 30 Community Partners participate
- 45 Clubs/Orgs participated in the Involvement Fair
- Over 100 students participated in the SOPride Parade

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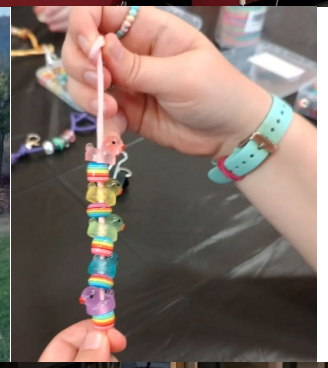

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Organizational Changes & Strengthening Student Support

University Housing & Dining → **Finance & Administration**

Realigning Auxiliary Operations: University Housing & Dining has transitioned from Student Affairs to Finance & Administration, aligning its operational oversight with the university's broader auxiliary enterprise model. **Why this matters:**

- Clarifies responsibility for the financial and operational management of an auxiliary enterprise
- Supports the Vitality Plan's focus on sustainable fiscal models for Housing & Dining

Vitality Plan: Housing & Dining is identified as an auxiliary enterprise requiring a sustainable fiscal model.

Advising & Orientation → **Welcome Dr. Erin Beard, New Director**

With Dr. Beard's leadership, we are launching the central advising location SU 312, open M-F 8am-4pm, creating a more visible, accessible place for students and faculty to get help navigating advising and student support.

Raider Student Services → **Advising & Orientation**

Raider Student Services joined Student Affairs in September 2026 and will report to the Director of Advising & Orientation. This alignment is designed to reduce the "runaround" students can experience when a question crosses functional areas. Instead of students having to figure out *who owns the question*, we can increasingly help them find the right answer, person, or next step in one place.

Southern OREGON UNIVERSITY

Meet the Team:

Dr. Erin Beard: liaison for these majors/programs Business Administration, Healthcare Administration, Innovation and Leadership, CMC (includes Communication, DCIN), Economics, Undeclared

Edward Derr: liaison for these majors/programs: Art, Emerging Media + Design, Criminology and Criminal Justice, History, Human Service, Sociology & Anthropology

Mary Patridge: liaison for these majors/programs: Creative Writing, Education, English Studies, Music, OAL, Theatre

Marissa Martes: liaison for these majors/programs: Health and Exercise Science, Mathematics, Pre-Physical Therapy, Psychology, Natural Sciences, Pre-Nursing Undeclared (students exploring options; for Pre-Nursing cert, students see Program Coordinator)

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Questions?

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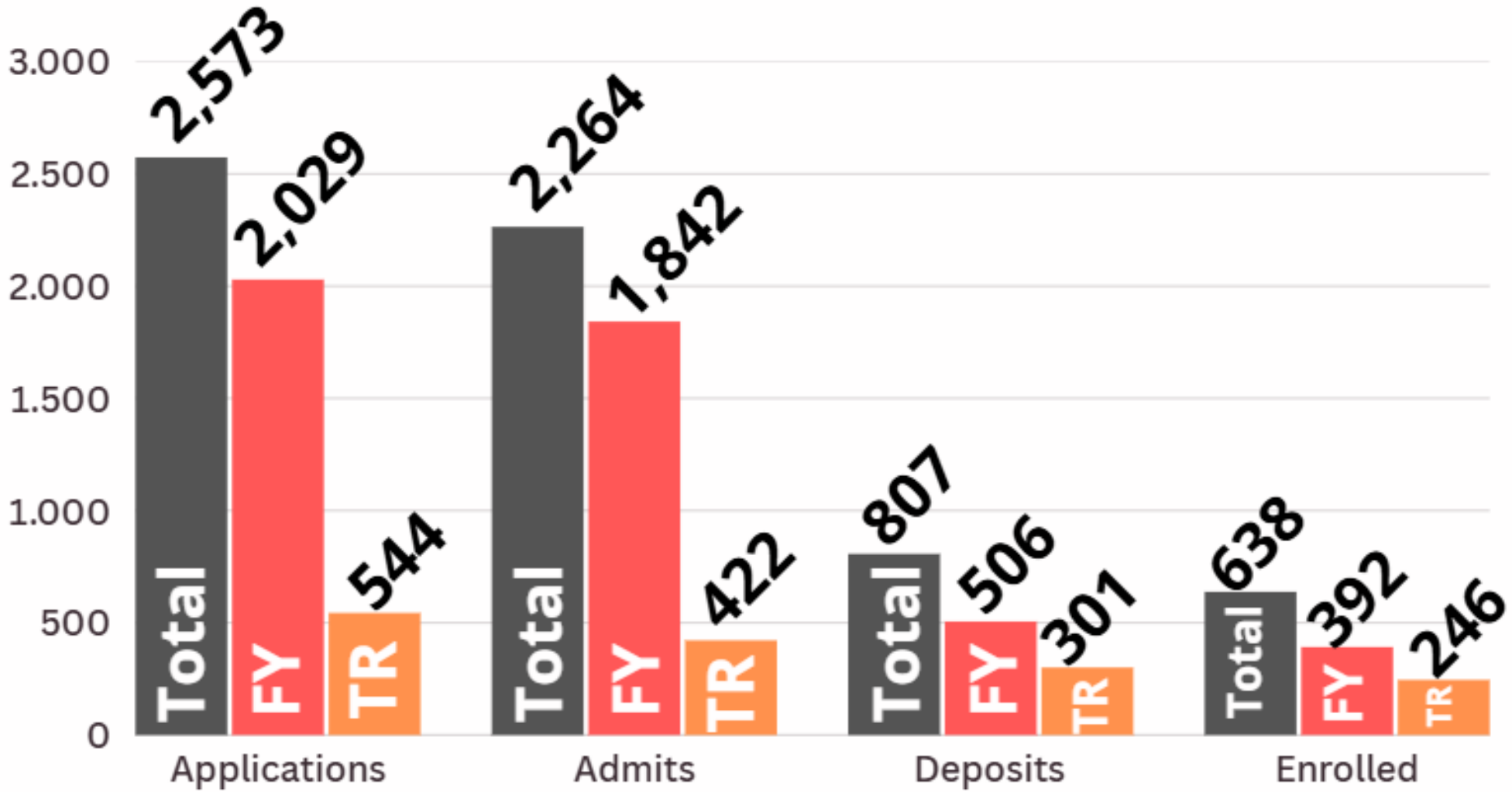
Recruitment, Admissions and Financial Aid Report

New First Year (FY) and Transfer (TR) Students



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ReUp Education – Southern Oregon University

The State of Oregon partnered with ReUp Education on behalf of the seven public universities and tasked them with reaching out to students who had stopped out prior to earning a degree in an effort to get them to return and complete their studies.

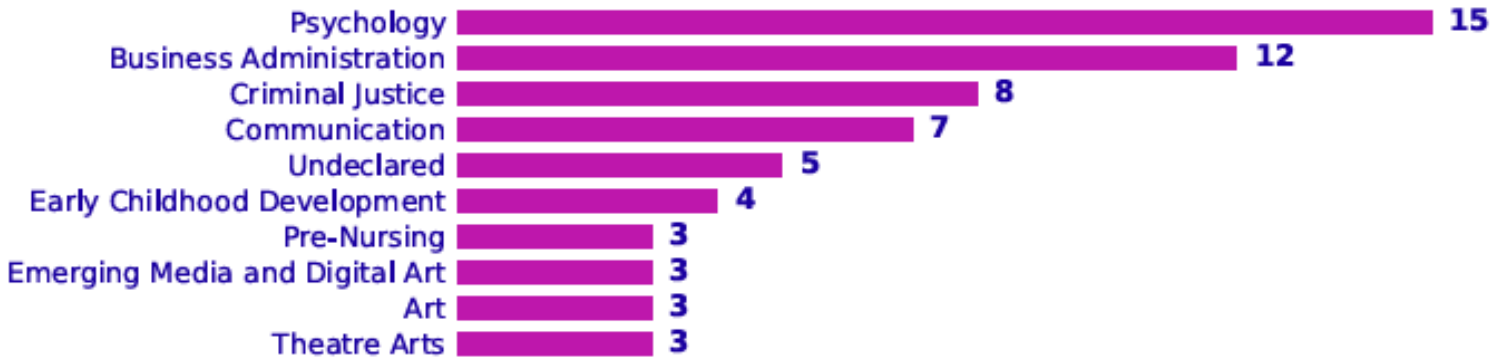
10,970
Learners outreached
Total outreach since launch

109
In our pipeline
Learners engaged with us

1.0%
Engagement rate
109 of 10,970 outreached

Profile of the 109 qualified learners

Top 10 programs of study



Southern OREGON UNIVERSITY

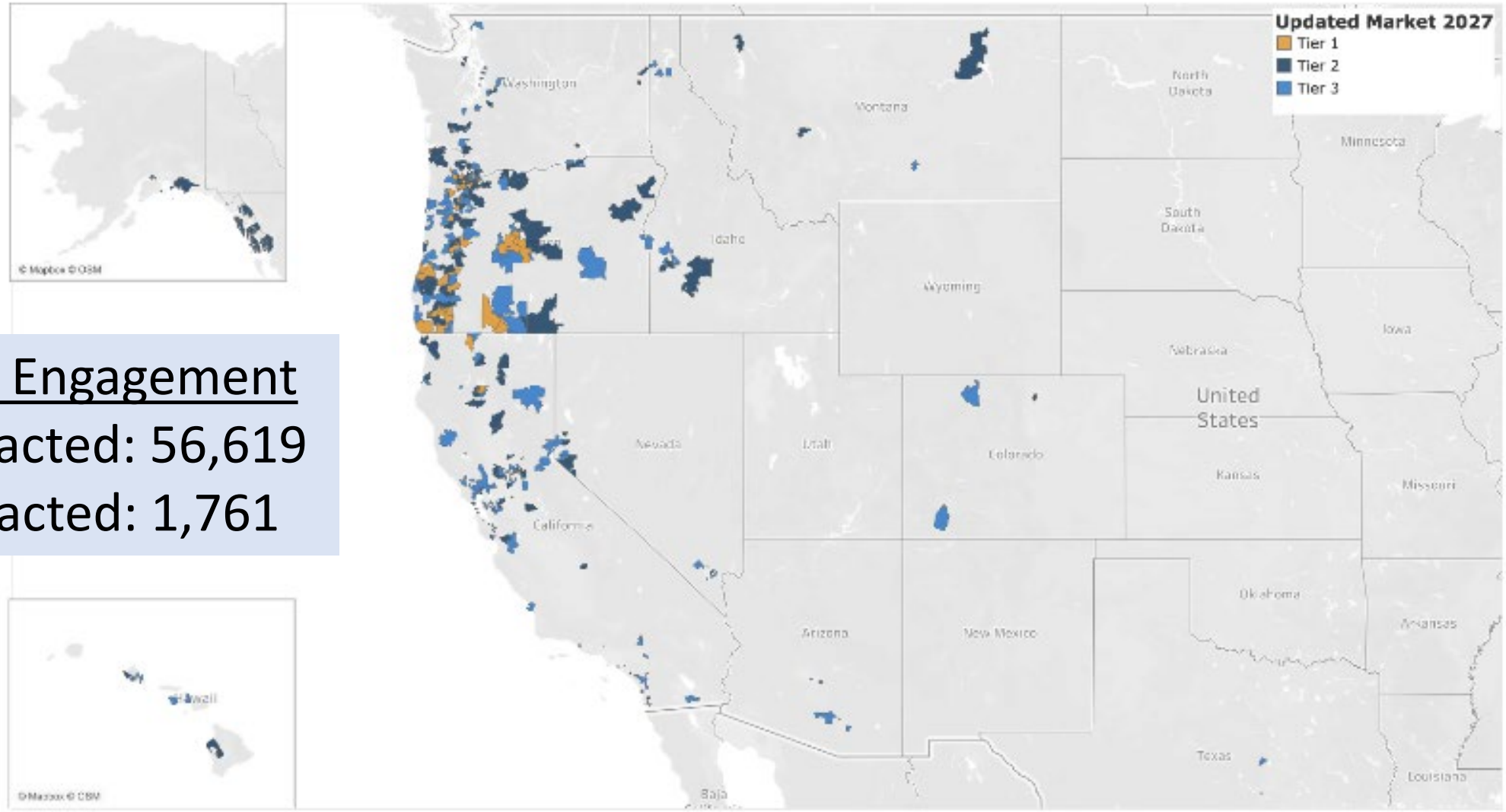
EAB-produced collateral for SOU, cont.

Cultivate

EAB-produced collateral for SOU

APPLY

Target markets based on historic SOU enrollment funnel



<u>Early Engagement</u>

Contacted: 56,619

Interacted: 1,761

Financial Aid FAFSA Completion

SOU added to FAFSA is the #1 indicator of future enrollment

Current Completion Rates / Local High Schools

Ashland High School - 91.4%
North Medford High School - 73.4%
Logos Charter - 63.2%
Phoenix High School – 62.7%
Eagle Point High School - 60.9%
South Medford High School - 59.2%
Jackson County as a whole is up 15.2% over last year (YTD)

FAFSA
U.S. DEPARTMENT OF EDUCATION
FEDERAL STUDENT AID

Southern OREGON UNIVERSITY

Financial Aid Rollout

First term for financial aid on Workday

- Staffing (resolved)
- Data Transfer (largely resolved)
- Packaging (resolved)
- OB3 Grad Eligibility (resolved)
- CPOS (resolved)

Southern OREGON UNIVERSITY

Articulation Summit

- Reconnect with RCC counterparts
- Update course articulations
- Create new course articulations
- Update articulations agreements
- Explore new articulation agreements

November 12, 2026
Higher Education Center - Medford

RCC SOU

Southern OREGON UNIVERSITY

Community College Road Trips

Late Summer in-person visits to community colleges

- Discuss articulations and agreements
- Learn about individual transfer behavior
- Talk about current in-demand programs
- Reestablish relationships and meet new contacts

Klamath Community College

Shasta College

College of the Siskiyous

Southern OREGON UNIVERSITY

Community College Partnership Branding

SOU Southern OREGON UNIVERSITY

Save $20,000* a year through the California to Oregon exchange!

Shasta College transfer students can qualify for resident tuition at SOU with the SOU Reciprocity Agreement.

To qualify:

- Be a resident of California
- Be admitted to SOU
- Earn 30 transferable units at Shasta College
- Have a minimum 2.0 GPA with an Associate degree or 2.25 GPA without a degree
- Obtain an exchange permit from Shasta College

Have an Associate degree with CalGETC completed? You will be guaranteed junior standing at SOU with all lower-division general education met.

shastacollege.edu/**TRANSFER** *Tuition subject to change.

Shasta College
www.shastacollege.edu
Shasta College is an equal opportunity educator and employer.

Transfer Center
(530) 242-7570

RCC Rogue Community College | SOU Southern OREGON UNIVERSITY

ABOUT RCC

Rogue Community College helps students start strong, stay close to home and move confidently toward their goals. Since 1970, RCC has served Jackson and Josephine counties with campuses and learning centers in Grants Pass, Medford, White City and the Illinois Valley.

At RCC, students benefit from affordable tuition, small class sizes and personalized support from faculty and advisors who are focused on student success. RCC offers multiple transfer degrees, more than 80 career and technical education degrees and certificates, and a wide range of workforce training and continuing education options.

Students planning to earn a bachelor's degree can begin at RCC and transfer smoothly to Southern Oregon University. RCC and SOU work together to align coursework so students are prepared for upper-division study. Popular transfer pathways include business, computer science, education, healthcare, human services, digital media and outdoor leadership.

By starting at RCC, students save money, build confidence and gain a strong academic foundation—while staying on track for a successful transition to SOU and beyond.

Current programs include but are not limited to:

- Business
- Computer Science
- Digital Cinema
- Early Childhood Development
- Education Studies
- Emerging Media and Digital Arts
- Health and Physical Education
- Healthcare Administration
- Human Services
- Outdoor Adventure Leadership

APPLY.RCC.EDU

Advantages of the Partnership

- Free transcripts sent between schools
- Admission to SOU from RCC is streamlined by SOU Admissions
- $60 SOU application fee is waived for RCC partnership students
- Partnership students can gain access to SOU facilities such as the Hannon Library, Career Services, and athletic games.
- Partner students who earn an associates degree from RCC (AAOT, ASOT, OTM) will enter SOU with junior status and their lower division general education will be considered complete.

ABOUT SOU

Southern Oregon University is a public, four-year university offering over 30 undergraduate majors and select graduate programs. SOU has a proud history providing regionally connected higher education opportunities to residents of the Rogue Valley and beyond for over 150 years.

RCC-SOU Transfer Admission Guarantee (TAG)
Students who earn an associates degree from RCC with a 2.0 GPA or higher are guaranteed admission to Southern Oregon University.

Transfer Admission Requirement

- Minimum of 36 transferable quarter credits
- Minimum transfer GPA of 2.25, 2.0 with a completed associates degree.

Financial Aid

- Submit FAFSA and add SOU (003219)
- Apply for admission by Feb. 1, to be considered for a merit scholarship (Fall term applicants)

Admitted students submit the Southern Oregon Scholarship Application (SOSA) by March 15.

APPLY.SOU.EDU

Waive the $60 application fee by using the promo code: RCC-Partner

SOU Southern OREGON UNIVERSITY

Transfer Pathways & Partnerships

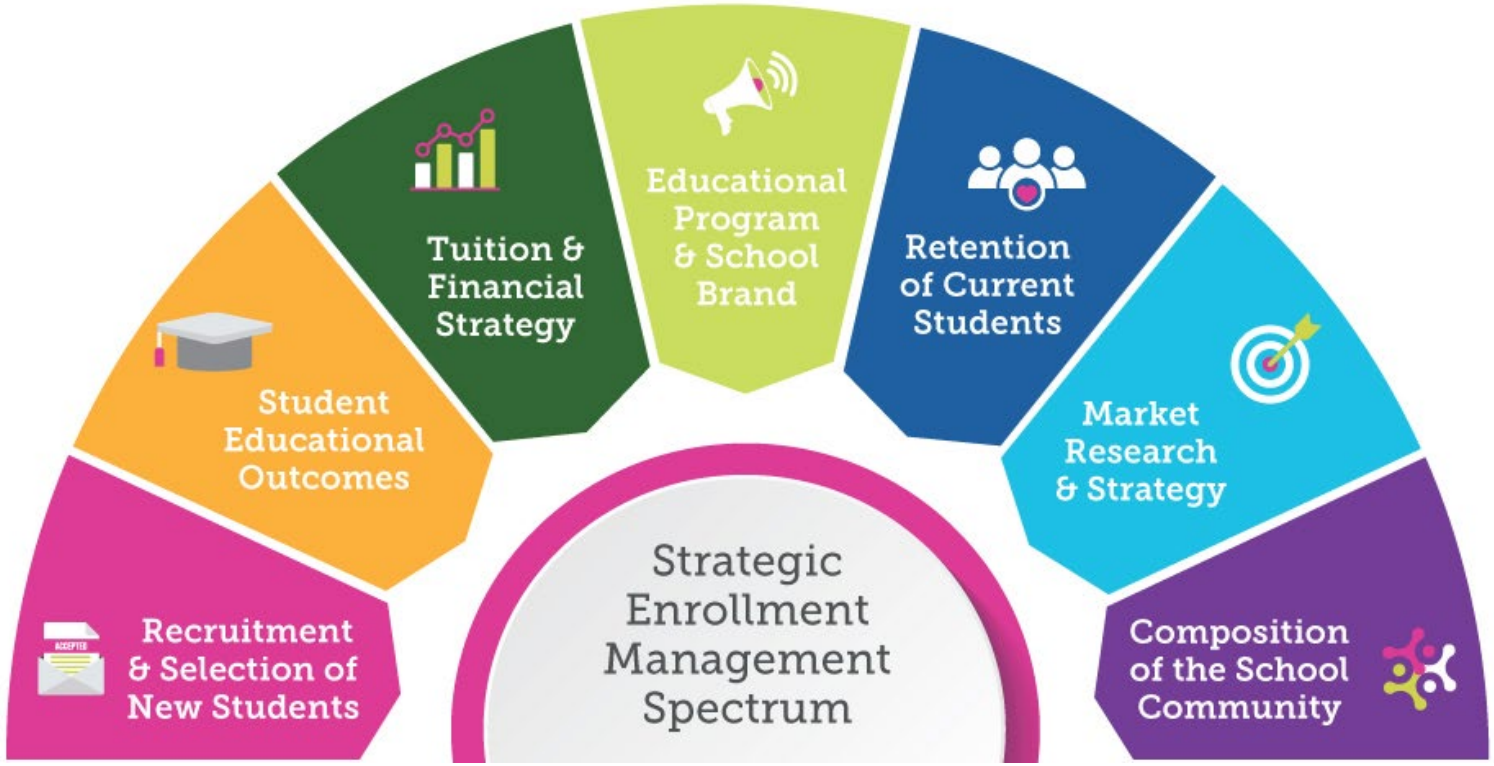
Rogue Community College Partnership

- Reverse transfer
- Articulation summit - November
- Dual marketing on degrees
- Dual branded program maps for transfers
- Dual advising
- Data share agreement
- TRiO collaboration

RCC
Rogue Community College

Enrollment Management Report

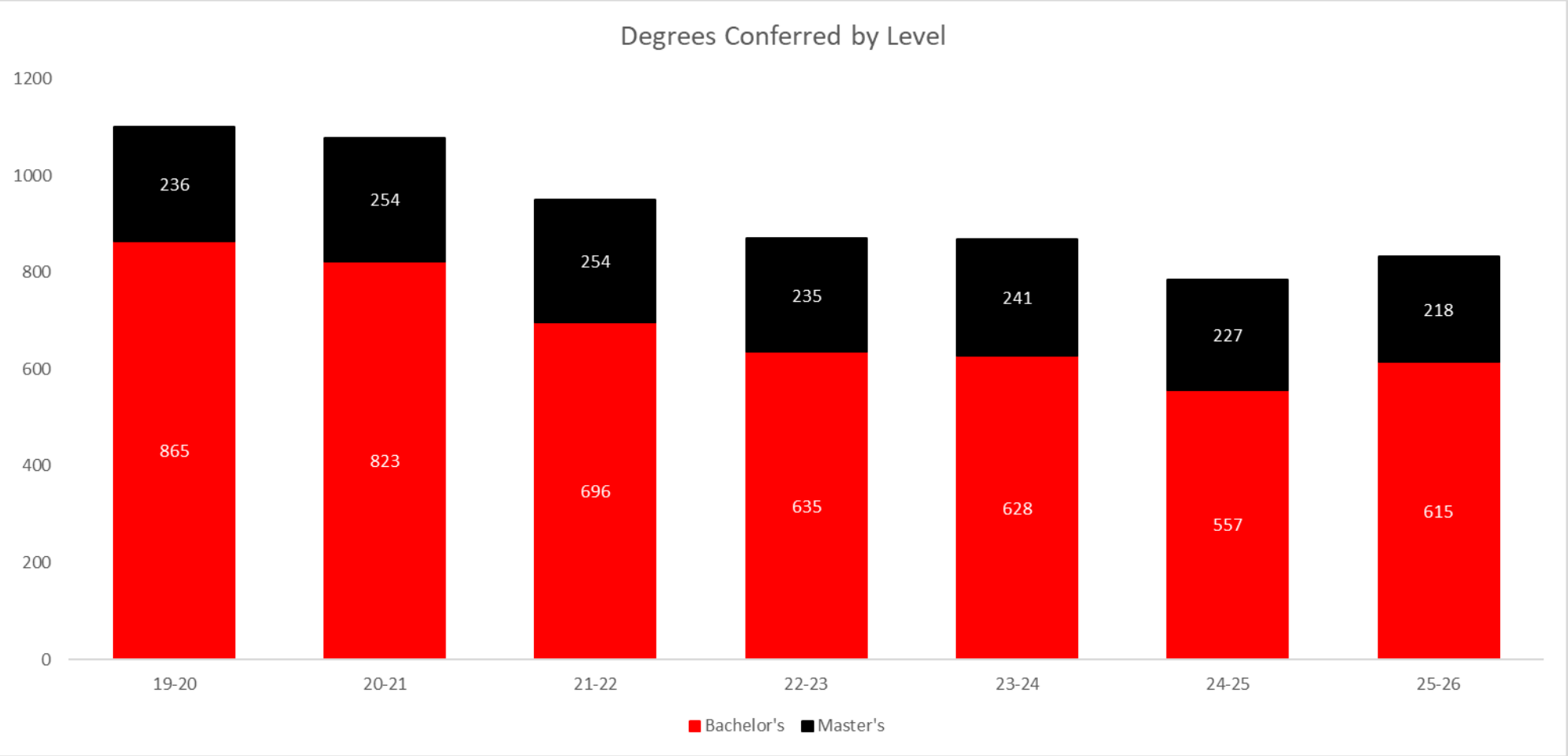
Enrollment Management Report



Ian Parent & Dr. Carrie Vath

October 15, 2026

Degree Completions as of (10/2/2026)



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Top Majors Fall 2026 (as of 10/2/2026)

Undergraduate
Business Administration
Psychology
Education
Health & Exercise Science
Theatre

Graduate
Business Administration
Education
Clinical Mental Health Counseling
Spanish & American Sign Language
Outdoor Adventure Leadership

Southern OREGON UNIVERSITY

Executive Report: Fall 2026 Overall Headcount and Student Credit Hours (SCH)

Student Data	Fall 2025	Fall 2026	Change	% Change
Grand Total Headcount	5,095	4,150	-945	-18.55%

Student Data	Fall 2025	Fall 2026	Change	% Change
Core SCH	36,869	32,563	-4,306	-11.68%
Supplemental SCH	8,430	8,624	194	2.30%
Grand Total SCH	45,299	41,187	-4,112	-9.08%

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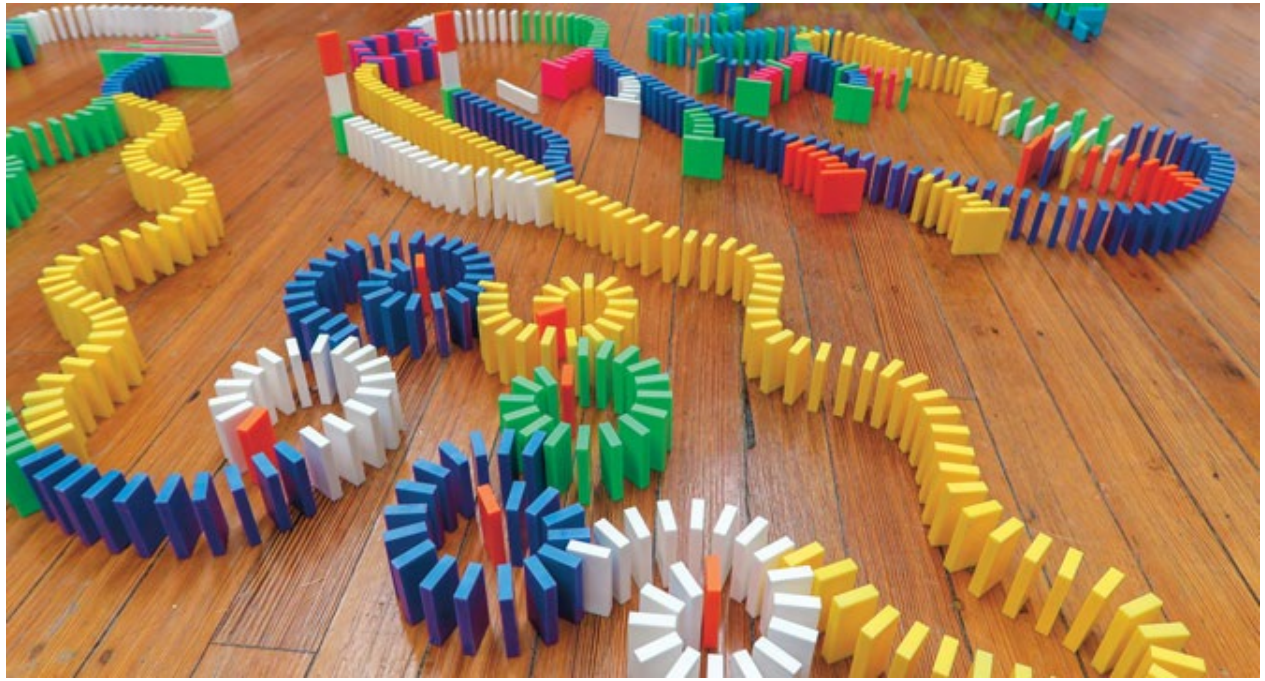
Questions?

Southern OREGON UNIVERSITY

Student Retention: From Strategy to Action



Dr. Carrie Vath
October 15, 2026

Retention: What We Know

- **Cost Matters:** Cost is the #1 factor students report in deciding to enroll/stay at SOU
- **The reason they leave varies by when they leave:**
  - During the refund window: financial pressure and sense of belonging/fit
  - Later in the term: behavioral health and medical issues become prominent

Challenging Tension:

Cost is a primary enrollment and persistence factor. Institutional scholarship support has declined/changed

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Our Retention Strategy: Retain students who are successfully progressing AND intervene earlier with students showing signs that they may need additional support.

Successful Students

How are we keeping them engaged and connected?

- Targeted Campaigns
- Appointments
- Belonging Programming
- Career
- Recreation
- Specialized Programs (UCAM, Trio, Bridge, Veteran's Resource Center, etc.)
- Proactive Communication

Students Showing Signs of Risk

How are we identifying and responding before a problem becomes a withdrawal?

- Progress Reports
- Attendance/enrollment information
- Care Notes
- Behavioral Health referrals
- Financial/basic-needs support
- Targeted campaigns
- Holistic Advising

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Identification to Connection

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How are we using Navigate360?

IDENTIFY
Attendance/Enrollment Census
Progress Reports
Care Notes

REACH
Targeted campaigns
Automated messages
Proactive outreach

CONNECT
Appointments
Referrals

ENGAGE
Belonging & Engagement
Career Connections
Trio
Bursars
Orientation

The goal is to move from knowing a student may need support to connecting the student with the right person or resource.

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How do we know if it's working?

1. Engagement
   - Are students responding to campaigns and scheduling appointments?
     - 36.5% of students identified as at-risk had an advising appointment (up 6.5%)
     - Opportunity: Appointment scheduling varies by student group and staff; room to improve how we move students from outreach to connection
2. Outcomes
   - Are students who engage with support persisting and making academic progress?
     - Seniors with appointments had 93% persistence vs. 87% without
     - Sophomores with an appointment earned, on average, 2 more credits than those without an appointment
     - Continuing to Evaluate
3. Process Effectiveness
   - Are the interventions actually moving students from alert to appointment to support?
     - Continuing to evaluate

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How do we scale what works? Moving from individual effort to a repeatable process

Updates for Fall 2026

Progress alerts

- Simplified the faculty process
- Easier for faculty to provide information

Automation

- Reduced manual messaging work for SSC's
- Allows more consistent outreach

Expanded Use

- Belonging & Engagement
- Career Connections
- New student Orientation

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What we have learned

- Identification alone isn’t enough. The value comes from getting students connected to a person or resource.
- Appointment conversion is an important opportunity. We can identify students who need support, but we need to improve the percentage who actually engage
- Some interventions need to be more coordinated across campus. This is where expanding use is important.

Path Forward: From Strategy to Execution

April 2026 priority	What we've done since April	What's Next
Improve early identification	Progress Alerts + Navigate360 campaigns	Continue refining outreach based on response
Increase student connection	Appointment campaigns + SSC outreach	Improve conversion from alert to appointment to support
Standardize support	Automation + revised processes	Expand consistent practices across units
Connect students to campus	Planning with key partners	Build/refine cross campus usage
Measure what works	Navigate Utilization + persistence outcomes	Continue term-over-term analysis

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SOU Vitality Plan: Academic and Student Affairs

SOU Vitality Plan

- Academic Portfolio:
  - Retained 30 Majors, 6 Stand-alone Minors, and 6 Graduate Programs
    - Teach-out of one major
  - Implement the Living Laboratory model
    - Mentorship as Method
    - Rogue Valley as the Classroom
    - Experiential Work as Curriculum
  - 24-to-32 Credits of Shared Courses
  - Streamlined Completion Pathways

SOU Vitality Plan

- Primary Goal: Curriculum Revision via
  - Opening current courses to new majors
  - Altering existing courses to then open to new majors
  - Developing new, shared courses

SOU Vitality Plan

- Aggressive Timeline
  - Phase I: build knowledge, verify program structures, identify shared course opportunities
  - Phase II: Align General Education
  - Phase III: Build shared, interdisciplinary courses
  - Phase IV: Synthesize and finalize new course offerings
  - Phase V: Curriculum Committee review begins first week of January

- Program Leads and Course Developers are receiving compensation

SOU Vitality Plan

- Student Support
  - Office of Advising & Orientation
  - Office of Belonging & Engagement
- Workday: Trainings and Challenges

#	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?

ACADEMIC AFFAIRS PROGRAMMING AND ORGANIZATIONAL STRUCTURE

New Departments & Majors/Stand-Alone Minors	Starting Faculty FTE	FTE Reduction	Classification	Remaining Faculty FTE
Arts & Communication	**15.00**			**12.00**
Art		2.00	Faculty	
Communication				
Digital Cinema				
Digital Cinema & Prod Arts BFA				
EMDA				
Media Innovation		1.00	Faculty	
Biology & Chemistry	**9.00**			**9.00**
Biology				
Biomedical Science				
Chemistry Minor				
Business & Economics	**15.00**			**14.00**
Applied Economics				
Business Administration		1.00	Faculty	
Healthcare Administration				
Innovation & Leadership				
Master in Business Admin				
Minor in Marketing				
Clinical Mental Health Counseling	**5.00**			**5.00**
Master in CHMC				
Computer Science & Math	**8.00**			**7.00**
Computer Science				
Applied Mathematics		1.00	Faculty	
Data Science				
Financial Mathematics				

Education	**12.00**			**11.00**
Associate Dean of Education				
Early Childhood Development				
Education Studies		1.00	Faculty	
Master of Art in Teaching				
Master of Science in Education				
Environmental Science, Policy & Sustainability	**5.00**			**5.00**
Ecology & Conservation				
Environmental Science & Policy				
Sustainability				
Health & Exercise Science	**8.00**			**6.00**
Health & Exercise Science		1.00	Faculty	
Outdoor Adventure Leadership		1.00	Faculty	
Humanities	**8.00**			**5.50**
English/First-year Seminar		1.50	Faculty	
Spanish Minor				
Master in Spanish Lang Teach				
Philosophy (no major or minor)		1.00	Faculty	
Library	**6.00**	1.00	Faculty	**5.00**
		1.00	Unclassified	
		4.00	Classified	
Performing Arts	**14.00**			**10.00**
Music		2.00	Faculty	
Theatre		2.00	Faculty	
		1.00	Unclassified	
		2.00	Classified	
Master of Theatre Prod & Desi				
Psychology	**9.00**			**8.00**
Psychology		1.00	Faculty	
Social Science	**15.00**			**11.33**
Criminal Justice		1.00	Faculty	
History				
Human Service		1.00	Faculty	
Sociology & Anthropology		.67	Faculty	
Minor in GSWS		1.00	Faculty	
Minor in Native American Stud				
Minor in Military Science				
Administration		2.00	Deans/Unclassified	
CATL		1.00	Unclassified	
Institutional Research		1.00	Unclassified	
Faculty Totals	**134.00**	**20.17**		

Staff Totals	**12.00**	
TOTAL SAVINGS		**$4,387,482**

Program Elimination

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.

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.

Program Benchmarks

Several academic programs have new benchmarks that must be attained as a test to their continued viability. These include:

Human Service

- Attain 60 total majors by September 2028
- Attain 90 total majors by September 2029
- Develop an online Human Service major pathway option, available to students starting September 2027
- Collaborate with PSY-SOAN for the joint development of major/program for students to become Licensed Behavioral Health and Wellness Practitioners; program ready to accept students by September 2028 (dependent on availability of Oregon Board of Psychology licensure requirements)
- Strengthen community partnerships for student recruitment and internship placement
- Develop and promote credit for prior learning options for certifications and work experience related to social service and behavioral health; and
- Explore offering continuing education for behavioral health practitioners.

Economics

- Faculty will be responsible for core curriculum in Business Analytics, including advising the certificate in Business Analytics

Media Innovation

- Attain 30 total majors by September 2028
- Attain 40 total majors by September 2029
- Consist of courses taught by existing faculty after the currently planned 2028 retirement

Accreditation Update

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.

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

Part 2: Our University's Accreditation Cycle

Question	Answer
What is the overall length of the NWCCU accreditation cycle?	The standard accreditation cycle for a member institution is **seven years**, culminating in a comprehensive evaluation and reaffirmation of accreditation.
What are the key reports/visits in the seven-year cycle?	The cycle requires several key reports and peer-review site visits (and an Annual Report is submitted every year): 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 Institutional Effectiveness (EIE) and Comprehensive Site Visit** (Full review of all standards and a self-study report).

Where are we currently in the seven-year cycle?	We are currently in our **third year** of the seven-year cycle, following our last full accreditation site visit (the Year 7 Evaluation of Institutional Effectiveness).
What is our next major accreditation milestone?	Our next major event is the **Ad-Hoc Special Report and Site Visit Fall 2026 (October 29-30).**
What is the focus of the Ad-Hoc Special Review?	The Special Ad-Hoc Review will provide SOU with the opportunity to demonstrate our efforts to come into compliance with NWCCU standards outlined in the August 2026 Action Letter.
What is the Board's role in this process?	The Board of Trustees plays a vital role in demonstrating **Standard Two compliance** (Governance, Resources, and Capacity). Specifically, the Board is responsible for: * Ensuring the long-term **financial stability** and **sustainability** of the institution. * Upholding **institutional integrity** and **academic freedom**. * Approving the mission and core themes, and monitoring the overall **effectiveness** of the university leadership and operations.

Accreditation Timeline

- July 2026-Commission Meeting Presentation
- August 2026-Action Letter received
- September 2026-Mid-Cycle Evaluation Report Submitted
- October 29-30 2026-Mid-Cycle Site Visit
- Spring 2027-Financial Resources Review
- Fall 2028-Mid-Cycle Review
- Fall 2029-Policies, Regulations, and Financial Review (PRFR)
- Fall 2030-Evaluation of Institutional Effectiveness (EIE)

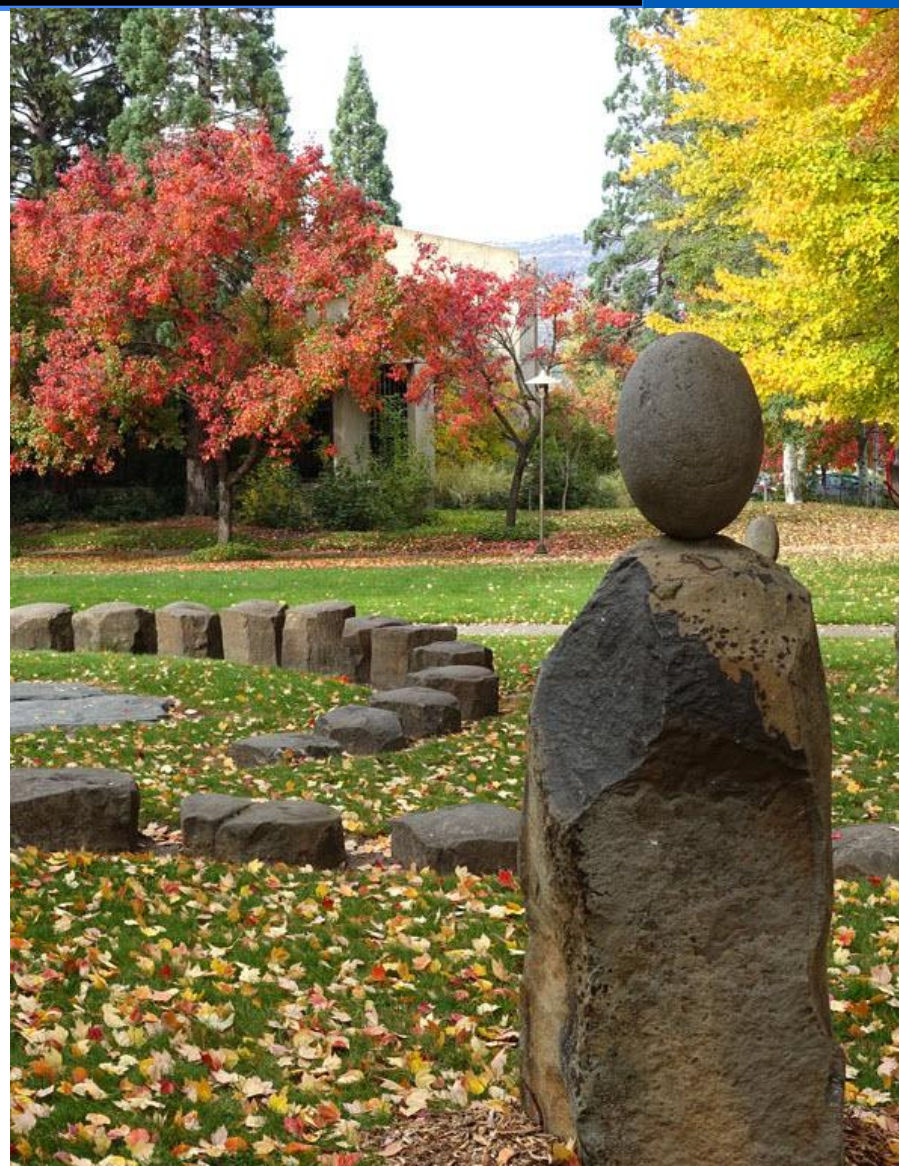
Student Core Information System Replacement Project (CISR) Report

Workday Student Update

10/15/26

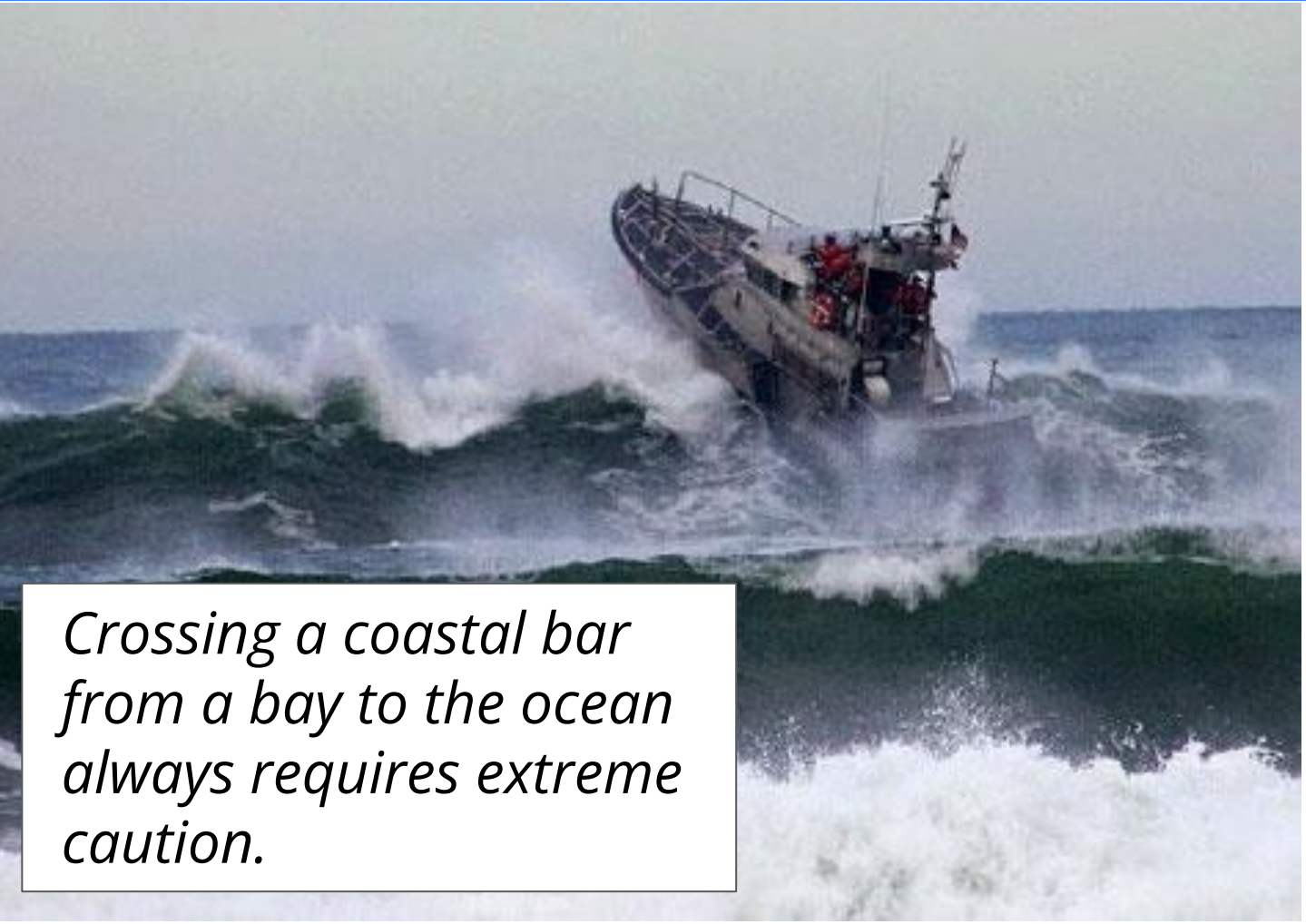
Key Processes Run Since June

- Student balances brought forward 😎
- Tuition & fees assessed 😎
- Financial aid disbursed* 😐
- Housing data integrated* 😐
- Waitlists processed 😎
- Summer grades converted 😎



* Vendor challenges (Bank Mobile, Star Rez)

“Where Fresh Water Meets Salt Water”



Crossing a coastal bar from a bay to the ocean always requires extreme caution.

From the Messy Middle to the Messy Beginning….

… systems are working, people are struggling to find their way over the bar

https://www.boat-ed.com/oregon/studyGuide/Coastal-River-Bars/10103802_175903/

Faculty Pinch Points

- Course override procedures
- Academic advising
  - Data uncertainty
  - Degree planning interface
- Missing reports

Faculty & Staff Support

- Weekly drop-ins
  - Mondays
  - Fridays
- Weekly Zooms
  - Workday Advising 101-104

Future Help

Support for Winter Registration

- Written guidance for students & faculty
- In-person and Zoom support sessions

General Support

- Workday 101-104 review
- Training for graduation application processes

Change Navigation

- Building confidence and fluency in Workday will take time and practice
- No single support or training opportunity will magically unlock all Workday knowledge and skills
- Take a few steps forward at a time

We're going to get there!

2027-2028 Committee Meeting Schedule and Future Meetings (Action)

SOU Board of Trustees 2027-2028 Board and Committee Meeting Schedule				
MEETING	**Academic and Student Affairs**	**Finance and Administration**	**Executive, Audit, and Governance**	**Board of Trustees**
DAY	Third Thursdays (Unless Otherwise Indicated)	Third Thursdays (Unless Otherwise Indicated)	Third Fridays	Third Fridays
FREQUENCY	Four Times Per Year	Six Times Per Year	Four Times Per Year	Five Times Per Year
TIME	1:00- 4:00 p.m.	5:00-7:00 p.m.	9:30-11:30 a.m.	12:00-5:00 p.m.
	January 21, 2027	January 21, 2027	January 22, 2027	January 22, 2027
		March 18, 2027		March 17, 18 or 19, 2027 Date/Time TBD
	April 15, 2027	April 15, 2027	April 16, 2027	April 16, 2027
		May 20, 2027		
	June 16, 2027±	June 16, 2027±	June 17, 2027±	June 17, 2027±
				Retreat September 16-17, 2027 All Day / Time TBD
	October 21, 2027	October 21, 2027	October 22, 2027	October 22, 2027
	January 20, 2028	January 20, 2028	January 21, 2028	January 21, 2028
		March 16, 2028		
	April 20, 2028	April 20, 2028	April 21, 2028	April 21, 2028
		May 18, 2026		
	June 15, 2028	June 15, 2028	June 16, 2028	June 16, 2028
				Retreat September 21-22, 2028 All Day / Time TBD
	October 19, 2028	October 19, 2028	October 20, 2028	October 20, 2028

DRAFT

* Occurs during the week following Commencement
± In observance of the Juneteenth holiday, June 2027 meetings will occur on Wednesday and Thursday instead of Thursday and Friday

Last updated July 2026

Adjournment