OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

October 9, 2026

TO: Southern Oregon University Board of Trustees

FROM: Sabrina Prud'homme, University Board Secretary

RE: Notice of Regular Meeting of the Board of Trustees

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

Action items on the agenda include the 2026-2029 Educator Equity Plan; the exploration of a scope change request for SOU's Creative Industries capital project; the board's 2027-2028 meeting schedule; and the university president's proposed goals for the 2026-2027 academic year.

The board will discuss an update on the SOU Vitality Plan and recognize the service of outgoing graduate student trustee, Rose Harwood.

Reports in this meeting will include those from the board's Academic and Student Affairs Committee, including an accreditation update and an enrollment marketing update; the Finance and Administration Committee, including a financial review and update; and the Executive, Audit, and Governance Committee, including a 2026-27 governance work plan. Other reports on the agenda include those from the Associated Students, Faculty Senate, and Staff Assembly of Southern Oregon University; the University President; and the administrative units of University Advancement, Athletics, and Government Relations.

The board will also review and evaluate the employment-related performance of the chief executive officer/university president in an executive session pursuant to ORS 192.660(2)(f)(i). No final decisions will be made in any executive session.

The meeting will occur as follows:

Friday, October 16, 2026
12:00 p.m. to 5:00 p.m. (or until business concludes)
Meese Room, 3rd Floor, Hannon Library
Members of the public may view the proceedings at https://sou.zoom.us/j/81821288617 at the time of the meeting.
Materials for the meeting are available at governance.sou.edu.

Churchill Hall, Room 107 • 1250 Siskiyou Boulevard • Ashland, Oregon 97520-5015
(541) 552-6060 • governance.sou.edu • trustees@sou.edu

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 public comments for 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 Meeting

October 16, 2026

SOU Land Acknowledgment

SOU Land Acknowledgment

In our desire for collective healing and partnership, we offer this Acknowledgment of Indigenous peoples and their connections to the land that Southern Oregon University occupies. This Acknowledgement was developed in conversation between Grand Ronde Tribal staff, Siletz Tribal staff, and Native American Programs faculty and staff at Southern Oregon University; it continues to be a living statement through this ongoing partnership.

This Land Acknowledgment may not be altered from this version, as changes will only occur in conversations with our partners.

We [you may say I or the name of a program/department] want to take this moment to 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 (https://www.grandronde.org) and the Confederated Tribes of Siletz Indians (http://www.ctsi.nsn.us/) are living descendants of the Takelma, Shasta, and Latgawa peoples of this area. We [you may say I or the name of a program/department] encourage YOU to learn about the land you reside on, and to join us in advocating for the inherent sovereignty of Indigenous people.

Call to Order / Roll / Declaration of a Quorum

Board of Trustees Meeting

Friday, October 16, 2026
12:00 – 5:00 p.m. (or until business concludes)
Meese Room, Hannon Library, SOU Campus
Zoom: https://sou.zoom.us/j/81821288617

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

12:00 p.m.	**1**	**Call to Order/Roll/Declaration of a Quorum**	
	1.1	Welcome and Opening Remarks	Chair Sheila Clough
	1.2	SOU Land Acknowledgment	Trustee Peter Buckley
	1.3	Trustee Recognition: Rose Harwood	Chair Sheila Clough
	1.4	Roll Call and Declaration of a Quorum	Sabrina Prud'homme, SOU, Board Secretary
	1.5	Agenda Review	Chair Sheila Clough
12:15	**2**	**Public Comment**	
	2.1	Invited Public Comment: Associated Professors of Southern Oregon University	Dr. Melissa Anderson, APSOU, President
	2.2	Invited Public Comment: SOU Service Employees International Union (Sub-local 84)	Sage TeBeest, SEIU, President
	3	**Shared Governance Reports**	
12:40	3.1	Associated Students of Southern Oregon University Report	Sophia Smith, ASSOU, President
12:45	3.2	SOU Faculty Senate Report	Lisa Wileman, SOU, Faculty Senate Chair
12:50	3.3	SOU Staff Assembly Report	Melissa Matthewson, SOU, Staff Assembly Chair
12:55	**4**	**President's and Administration Reports**	
	4.1	President's Report	President Rick Bailey
		4.1.1 University Advancement Report	Janet Fratella, SOU, Vice President, University Advancement and Executive Director, SOU Foundation

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

AGENDA (Continued)

		4.1.2 Government Relations Report	Marc Overbeck, SOU, Director, Government Relations
		4.1.3 Athletics	Matt Sayre, SOU, Director of Athletics
1:20	4.2	SOU Vitality Plan Update	President Rick Bailey
2:00		**BREAK**	
2:10	**5**	**Academic and Student Affairs Committee Report**	
	5.1	General Committee Report	Trustee Iris Maria Chavez
	5.2	Accreditation Update	
	5.3	2026-2029 Educator Equity Plan (Action)	
	5.4	Enrollment 360 Update	
2:35	**6**	**Finance and Administration Committee Report**	
	6.1	General Committee Report	Vice Chair Liz Shelby
	6.2	Financial Review and Update	
	6.3	Exploration of Scope Change Request for Creative Industries Project (Action)	
	7	**Executive, Audit, and Governance Committee Report**	
3:10	7.1	General Committee Report	Chair Sheila Clough
	7.2	AY 2026-27 Governance Review	Chair Sheila Clough
	8	**Action, Information, and Discussion Items**	
3:20	8.1	2027-2028 Board of Trustees Meeting Schedule and Future Meetings (Action)	Chair Sheila Clough
3:25		**BREAK**	

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

AGENDA (Continued)

3:35	8.2	University President's Academic Year 2025-26 Evaluation [Executive Session Pursuant to ORS 192.660(2)(f)(i)]	
4:10	8.3	University President's Academic Year 2026-27 Goals (Action)	President Rick Bailey
4:30 p.m.	**9**	**Adjournment**	Chair Sheila Clough

Public Comment

Shared Governance Reports

- Associated Students of Southern Oregon University
- SOU Faculty Senate
- SOU Staff Assembly

President’s and Administration's Reports

CELEBRATING 154 YEARS

PRESIDENT'S REPORT TO THE BOARD OF TRUSTEES

President Rick Bailey

October 2026

Southern OREGON UNIVERSITY

TEAM REPORT DISCUSSION TOPICS

- **Advancement**
  - Fundraising Totals
  - Public Campaign Event October 21 2026
  - Website Transition Coming Soon
- **Campus Belonging**
  - Survey Results
  - Actions in Progress

TEAM REPORT DISCUSSION TOPICS

- **General Counsel and Special Projects**
  - Opportunity Zone and Older Adult Living Community
  - Partnerships for Campus Facilities
- **Athletics**
  - Five Years of Eligibility
- **Government Relations**
  - HB 4124 Update
  - Upcoming 2027 Legislative Session

TEAM REPORT DISCUSSION TOPICS

- **Vitality Plan**
  - Disciplined Approach with Accountability Measures
  - Transparency and Approachability (Dashboard)
  - Curriculum Redesign

- **SOU Strategic Plan**
  - Mission and Vision Timeline
  - Values and Behaviors
  - Focus on Enrollment and Retention

QUESTIONS AND DIALOGUE

Thank You!

University Advancement Update

October 2026

OUR MISSION

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

OUR VISION

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

ALUMNI RELATIONS

- The AR team launched a structured student-alumni mentorship program with the School of Business this term using the Raider Network platform. The project will focus on increasing student participation with academic partners, recruiting and vetting alumni mentors, and using connection-building to improve retention and career outcomes. So far, nearly 75 alumni have volunteered to be mentors; recruitment of students is in process.

- Raider alumni gatherings are scheduled for Medford (Nov. 5, 2026) and Portland (Dec. 7, 2026) this fall and will be used to share updates about the university's transformation as well as the campaign. All trustees will receive invitations.

- Homecoming is set to occur Oct. 21-24, 2026. Activities include the annual Distinguished Alumni Awards, the fourth annual Alumni Golf Tournament, a spirit event at Omar's, and an SOUAA alumni event prior to the football game. All trustees are invited to attend these events. Invitations were sent separately for the alumni awards event.

MARKETING AND COMMUNICATIONS

- The new enrollment-optimized website is nearly complete, with launch schedule for later this fall. The intent is to ensure that potential students have an interactive site that is geared to their needs so they can navigate to essential enrollment-specific information as easily as possible. This website transformation was made possible through funding from the State of Oregon (TRU + PSU funds), which awarded SOU more than $300,000 for this initiative in 2024.

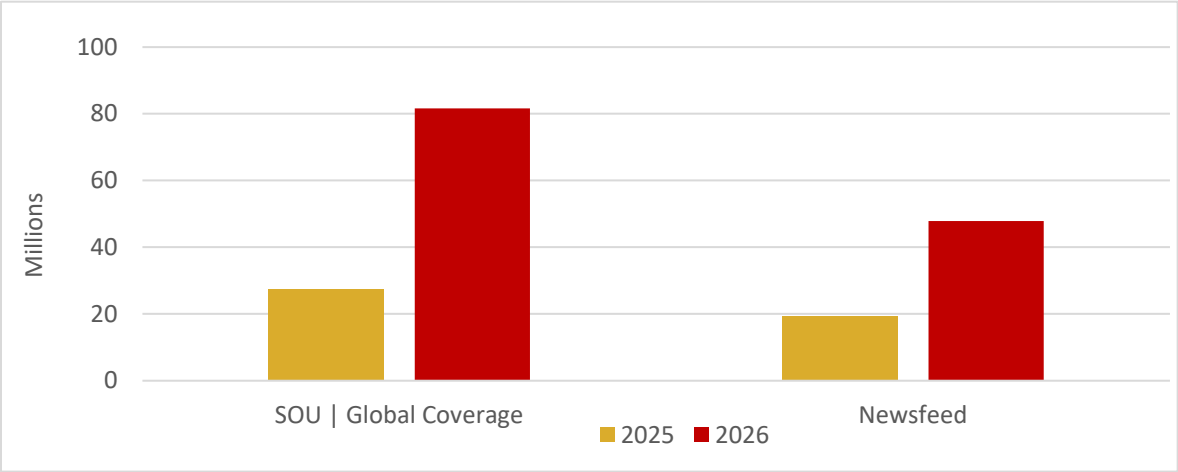
- EAB Enroll360—the enrollment marketing tool approved by the Governing Board in Spring 2026—is up and running. As a reminder, the expectation is that Fall 2027 enrollment is when results are expected to determine the impact of the platform.

- The marketing team secured 15 billboards at reduced rates for a fall public awareness campaign for the university. These billboards are located thought the cities of Medford and Grants Pass. Additionally, the Cow Creek Umpqua Tribe of Indians and SOU are partnering on two billboards along I-5 that will provide visibility for both organizations. Finally, several buses in the Jackson County region will have "supertail" wraps featuring SOU for the next year.

- SOU was mentioned an average of 9 times per day during the period of Oct. 1, 2025 to Sept. 30, 2026. That is up 80% from the previous year. In May 2026, global mentions of SOU had a

"potential" reach of 1.85 billion; however, those stories that are considered "most relevant" to SOU reached 897 million in March 2026. Stories about the Vitality Plan and emergency funding from the legislature drove these figures.

- Free mentions of SOU in the news media have a significant impact on the SOU brand. While free mentions cannot replace paid advertising, they do increase the university's visibility, and they often reach a broader audience. These mentions are the result of casual mentions about the university and also those stories that have been "tagged" for their relevance. The following chart shows a financial value of these stories using an advertising rate of $.37/column inch.



DEVELOPMENT and SOU FOUNDATION

- Campaign kick-off event scheduled for Oct. 21, 2026. All trustees received printed invitations and are encouraged to attend.

- The foundation board added four trustees to its roster for terms that began on July 1, 2026. At-large trustees include Jason Chao '02, Todd Elworthy, and Dena Matthews. Sarah Tisch joined as an affiliate trustee for the Osher Lifelong Learning Institute.

- The foundation board also added a Legislative Advocacy Committee, which met for the first time in September. The goal of the committee is to collaborate with SOU Government Relations to help advocate for SOU as needed. Government Affairs Director Marc Overbeck is the lead staffer for the committee.

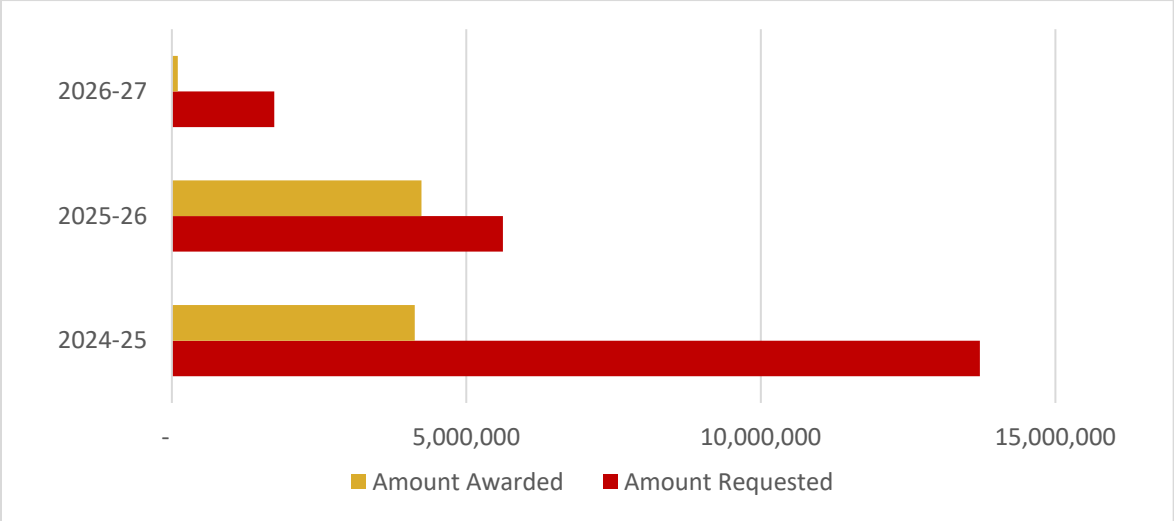
SPONSORED PROGRAMS

- The most significant news this quarter has been the approval by the federal government of SOU's request to convert a $2 million grant awarded for solar energy into academic and student programming that supports the intersection of climate resiliency and workforce development.

- 20 of the 35 competitive grant proposals in FY26 were awarded successfully (57% success rate).

- So far this FY, three SOU faculty have separately submitted research grants to the National Science Foundation and National Institutes of Health totaling more than $1.4 million in grant requests.
    - Bernie Boscoe, Computer Science - NSF - $578,000
    - Kelly Szott, Sociology and Anthropology - NIH - $460,000
    - Noriko Toyokawa, Psychology - NIH - $375,000

- The Southern Oregon Early Learning Professional Development Consortium (SOELPDC), led by Younghee Kim in Education, was awarded an additional $257,000 in one-time funding in addition to the existing $1.75M grant from the Oregon Department of Early Learning and Care.



OSHER LIFELONG LEARNING INSTITUTE

- OLLI at SOU is offering more than 130 courses this fall, 80 of which are held onsite at the SOU Campbell Center. Membership stands at more than 1,600. OLLI at SOU is among the largest in the country—#8 of 124 sites.

- OLLI has expanded programming by partnering with the Rogue Valley Manor to offer courses in Medford and Talent Maker City to offer unique, hands-on art courses. OLLI continues to grow and invest in capital improvement projects like digital announcement boards and expanded parking. OLLI contributes nearly $600,000 in funding for SOU through the one-credit program.

Government Relations Update

Board of Trustees
October 16, 2026

September Legislative Days Retrospective

- **Unanimous vote to release the final $7.5 Million Special Purpose Funding**: Many legislators praised SOU for "getting itself on the right track" President Bailey spent three days in Salem and met with 15 legislators over that period of time to support this outcome.
- **Strong showing from SOU around teacher preparation**: Education Dean Jesse Longhurst delivered well received invited testimony to the Interim House Higher Education Committee on SOU's work in implementing the Governor's Executive Order around Science of Reading curriculum
- **BOT Confirmations**: Trustees Barry, Chavez renominated and confirmed; Trustee Villanueva confirmed for Graduate Student position

HB 4124 Progress

- **Preliminary Report Released**

- **Advisory Committee**
  - Meeting November 9 in Medford at the Higher Education Center, shared by RCC and SOU.

- **Work Groups**
  - 5 Workgroups to receive additional ideas and thinking
    - SOU participating on:
      - Financial Challenges (Carson Howell)
      - Institutional Differentiation (Marc Overbeck)
- **Final Report Due April 1**

Governor's Recommended Budget

- **HECC Agency Requested Budget capped at CSL Funding**
  - HECC Proposed June: 9.3%
  - HECC Corrected August: 7.5%

Bottom Line: Flat Funding for Oregon's public universities that likely will not keep up with higher-education related inflation

HECC Updates

- **HECC Funding and Achievement Committee October 7**
  - Review of the staff recommendation on a revised SSCM Model (which would offer SOU a *slight* improvement for our share of the Public University Support Fund).

- **Full Commission October 8-9**
  - Joint testimony by President Bailey and Sage TeBeest
  - SOU Evaluation – favorable and showing increases in the total number of graduating students, despite a 16% reduced student headcount

2027 Session – A Look Ahead

➔OPU Shared Priorities HECC Legislative Concepts:

- ◆Current Service Level (CSL) Adjustment
- ◆Oregon Retirement Program default
- ◆Contracting Modernization
- ◆Adult Learner Re-Enrollment
- ◆Capital Improvement and Renewal Flexibility

➔HB 4124 Activity

- Final Report by April 1, 2027
- Several individual proposals on reforming higher ed

Questions???

SOU Vitality Plan

(Demonstration of Dashboards and Reporting in Meeting)

Academic and Student Affairs Committee Report

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)

2026-2029 Educator Equity Plan (Action)

The 2026 - 2029 Educator Equity Plan at Southern Oregon University

Southern OREGON UNIVERSITY

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

Southern OREGON UNIVERSITY

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)

Southern OREGON UNIVERSITY

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 NorthW est (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

Southern OREGON UNIVERSITY

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?

Southern OREGON UNIVERSITY

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.

. .

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

DRAFT

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.

DRAFT

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

DRAFT

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

DRAFT

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.

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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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Enrollment 360 Update

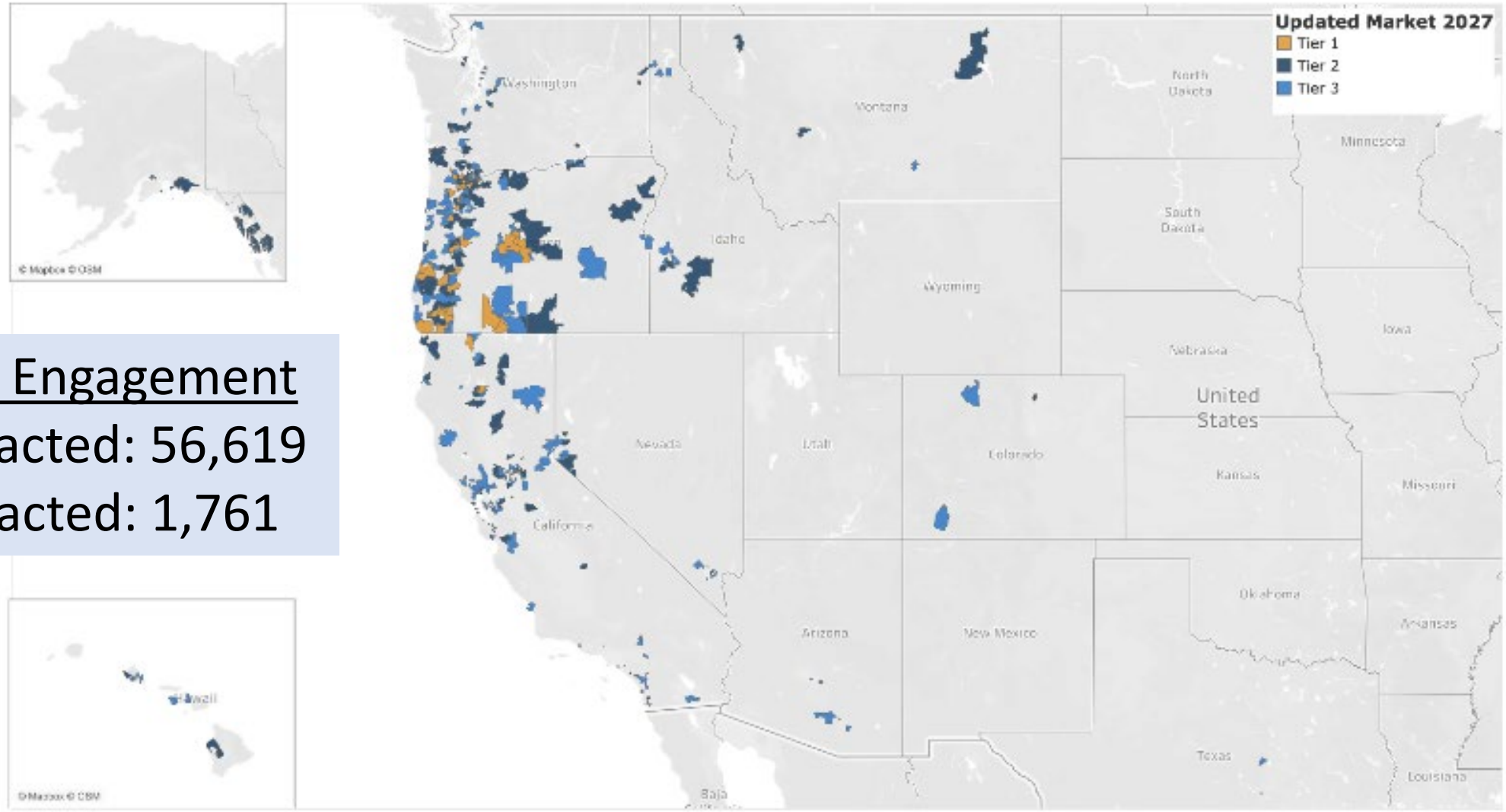
EAB-produced collateral for SOU, cont.

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

Finance and Administration Committee Report

Financial Review and Update

Links to Financial Reports, as of Aug. 30, 2026

- Comprehensive Monthly Financial Report
- Fiscal Year 2026-2029 Cash Flow Projection
- Education & General Fund and All Funds

Reports available on SOU's Vitality Plan website:
https://sou.edu/president/path-to-fiscal-sustainability/#toggle-id-2

Exploration of Scope Change Request for Creative Industries Project (Action)

Proposed Capital Project Scope Change
Background Information

Southern Oregon University's Creative Industries/Student Success (CISS) project was developed as a capital project investment for the 2025–2027 biennial Agency Request Budget for the Higher Education Coordinating Commission and the Governor's Recommended Budget. The project proposed renovations to SOU's existing Music Building and Digital Media Center to create a Creative Industries Center and a Student Success and Leadership Center. The Board of Trustees of Southern Oregon University authorized the project for the state's prioritization process; it advanced through the state's higher education capital planning process; and the 2025 Legislature approved approximately $41 million in state-supported bonds. Bond issuance is anticipated in Spring 2027.

The SOU administration seeks the Board of Trustees' approval to explore a strategic scope change for these bond funds. With the board's permission, the university would evaluate using the approved bond funding to acquire the Shasta and McLoughlin student residence halls including the feasibility, process, risks and mitigations, potential advantages, and other factors related to the proposed scope change.

We know that cost matters to our students, and it is a primary enrollment and persistence factor. Among students who withdraw from SOU, cost is the number one reason they leave. Focusing the authorized bond funds toward acquiring these facilities can help SOU address student financial barriers by positioning SOU to lower its on-campus housing costs, particularly in the Shasta and McLoughlin residence halls.

Additionally, in light of the University's broad and strategic transformation efforts, this scope change would help SOU meet the legislative budget note mandates for SOU to "achieve long-term structural fiscal balance" and to "evaluate options for [fiscal] sustainability." If achieved, this scope change and the resulting facility acquisition could also help SOU meet those legislative mandates, preserve the state's existing capital commitment to SOU, eliminate one of the University's largest long-term financial obligations, improve ongoing operational cash flow, and strengthen the University's financial position, further positioning SOU to thrive.

While the CISS project remains an important priority, student affordability and SOU's financial sustainability are also important and require immediate action. Exploring a scope change requires a formal review and state authorization for which, the board's approval is necessary. Using the state's investment to acquire the Shasta and McLoughlin student residence halls can benefit students and provide immediate structural support for SOU's long-term financial sustainability. The administration therefore requests Board approval to engage in the state's formal process to explore and evaluate the curricular, financial, operational, and strategic implications of this scope change.

Southern Oregon University
Board of Trustees

Resolution

Exploration of a Strategic Bond Scope Change for the Creative Industries / Student Success Capital Project

Whereas, the Board of Trustees of Southern Oregon University (SOU) previously prioritized and advanced the Creative Industries / Student Success (CISS) capital project, which advanced through Oregon's capital projects review process and received approval for funding by the Oregon State Legislature in 2025; and

Whereas, state bonds for the authorized capital project are currently scheduled to be sold in or around April of 2027, yielding approximately $41 million in proceeds; and

Whereas, the university faces immediate financial challenges including affordability for students and long-term fiscal sustainability for the institution;

Whereas, to address these challenges, the university administration has proposed that SOU explore a strategic scope change request to apply capital bond proceeds previously approved for the CISS capital project to the acquisition of the Shasta and McLoughlin student residence halls on the campus of SOU;

Whereas, the SOU administration requests the board's authorization to investigate and explore the feasibility, process, risks and mitigations, potential advantages, and other factors related to the proposed scope change; and

Whereas the capital asset acquisition of these student residence facilities will offer greater ability to advance SOU's institutional transformation; address student financial barriers by positioning SOU to lower its on-campus housing costs, particularly in the Shasta and McLoughlin residence halls; help SOU meet legislative mandates; preserve the state's existing capital commitment to SOU; eliminate one of the University's largest long-term financial obligations; and strengthen the university's financial position, further positioning SOU to thrive, which all shall be explored in the evaluation; Therefore,

Be it resolved that a compelling case exists to explore seeking a scope change for the approved bond funding and on the recommendation of the Finance and Administration Committee, the Board of Trustees of Southern Oregon University hereby authorizes the University President and Administration to undertake such efforts, stakeholder engagement, and initial procedural steps, including but not limited to submitting preliminary materials to the state's Higher Education Coordinating Commission by November 1, 2026, to initiate the process of thoroughly exploring and evaluating this potential scope change request;

Be it further resolved that the University President and Administration shall, in a public meeting, provide to the Board of Trustees not later than January 21, 2027, the following information learned from this exploration: A comprehensive update to the Board of Trustees including findings regarding the process, risk assessments, mitigation strategies, curricular impacts and any unmet needs, benefits anticipated to be realized, stakeholder sentiment, financial modeling related to the acquisition, and a proposal for how the cost reductions will affect students and the university, as well as the continued viability of the CISS project.

Executive, Audit, and Governance Committee Report

AY 2026-27 Governance Workplan

- Retreat: Board Culture (September)
- Board Meeting Schedule (October)
- Board Gap Assessment (November – December)
- 2027 Board Evaluation (January or April – September)
- Scheduled Review of Board Statements/Policies (January – October)
- Recruitment of Trustees (January – June)
- Trainings and Refreshers: TBA 2026 – 2027

2027-2028 Board of Trustees 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 18, 2027 3:00 - 4:30 PM
	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

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

Last updated July 2026

University President's Academic Year 2025-26 Evaluation

Executive Session Pursuant to ORS 192.660(2)(f)

University President's Academic Year 2026-27 Goals (Action)

President's Draft Goals 2026-2027

Goal #1: Implementation of the Vitality Plan

Process Targets:

- Provide Dashboard Transparency and Stakeholder Accountability, so that we Track Workstreams in Real Time to Completion
- Update Mission/Vision/Values to Strategic Plan (and add Behaviors)
- Develop Initial Structure for Community Engagement for Experiential Learning (aligned to Vitality Plan target)
- Develop plan and process to achieve Reserve Target and R>C Ratio by the end of FY 2027-28

Outcome Metrics

- $20M in Cost Savings
- Positive Cash Flow Projections through June 2029

Goal #2: Student Enrollment

Process Targets:

- Pursue Innovative Enrollment Strategies
  - Increase ReUp engagement rates
  - Launch Enroll360
  - Launch New Website by June 30, 2027
  - Increase the distribution and success of Raider Influencer Cards
  - Pursue additional Marketing Initiatives
- Refine Enrollment Data Sharing

Outcome Metrics

- Fall 2027 Student FTE flat / at Fall 2026 levels or better (disrupt model's -3.4% prediction with correlating budget assumption)
- Fall 2027 Student Credit Hours (SCH) flat / at Fall 2026 levels or better

Goal #3: Student Retention and Success

Process Targets:

- Continue Strategies in Future Ready Enrollment Plan and Vitality Plan
- Streamline Pathways
  - Evaluate new Student Advising Model (centralized Student Success Coordinators)
  - Streamline Onboarding of New and Transfer Students
- Early detection of students with financial or academic risk

Outcome Metrics

- Fall 2027 First-Year Full-Time Retention Rate 70%
- Overall UG retention rate 80%
- Reduce DWFI rates overall, and in Gateway Courses by 5%?

Goal #4: Fiscal Management

Southern OREGON UNIVERSITY

Process Targets:

- Development of new Accountability and Monitoring Processes
  - ➢ Produce and distribute timely Monthly Financial Reports to the Board of Trustees and the HECC
  - ➢ Provide Access to All Campus Stakeholders;
- Sunset Banner
- Establishment of Budget Tripwires and Budget Officer Awareness

Outcome Metrics

- Deliver Monthly Financial Reports by 25th day of each month
- 95% of departments on or under budget

Draft Goals 2026-2027

Plus…

Campus Culture

Joy, Cohesion, Celebration and Family

Adjournment