**SOU | Southern OREGON UNIVERSITY**

Year Seven

Self-Evaluation Report

PREPARED FOR
THE NORTHWEST COMMISSION ON COLLEGES AND
UNIVERSITIES

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# Southern Oregon University

Year Seven Self-Evaluation

Report September 2016

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# Institutional Overview

Southern Oregon University (SOU) has provided outstanding educational opportunities to students for over 140 years. The Institution is a key partner with businesses, government organizations, and community partners as well as other educational institutions. Over the past several years, the University has faced significant challenges, including the changing profile of higher education in Oregon, reductions in state allocations, shifting student demographics, and evolving workforce opportunities. SOU has responded by being strategic in its planning and activities, adapting to the needs of the region and our students, and remaining firmly committed to our mission and goals of preparing students for success in college and beyond.

At close of fiscal year 2015–16 and two years into the retrenchment process initiated in 2014, Southern Oregon University is in sound financial health, meeting or exceeding nearly all the financial, enrollment, and retention goals articulated in the retrenchment plan. The University has been greatly aided by careful and transparent planning, committed leadership, and the proficient oversight of our new local Board of Trustees. The board's Finance Committee has been particularly helpful, providing guidance and feedback to both our staff and trustees. In 2014, when the Higher Education Coordinating Commission (HECC) was legislatively entrusted with oversight of higher education in Oregon, conditions governing the transition to and continuation of independent governance were articulated to SOU. These conditions defined expectations around clearly delineated metrics pertaining to enrollment, retention, and other aspects of the Institution's operations. We have successfully met or exceeded these conditions, integrating them into our planning and decision-making processes, which are guided by our commitment to serving our students, the region, and the future of the University.

In July 2016, SOU welcomed Dr. Linda Schott as its new president following a two-year interim presidency and a comprehensive, national search. Beginning this fall, Dr. Schott will lead the University into a strategic planning process, which will be significantly enhanced by the diligent planning and analysis that have guided retrenchment and other recent transitional processes.

Following the fall 2015 enrollment of SOU's largest first-year cohort in decades, enrollment continues to look strong. New initiatives such as the first-year Bridge Program and other programming for incoming first-year students demonstrate increasing efficacy in efforts to integrate and retain new students.

Southern Oregon University continues to make college affordability a top priority. A funding initiative from the Oregon legislature's 2015 session enabled the University to prioritize tuition remissions and implement additional student services designed to increase retention, graduation rates, student success, degree completion, and affordability.

In accordance with the State of Oregon's 40-40-20 graduation goals, SOU continues to recruit first-generation and low-income students. The number of minority students on campus grew during 2015–16 compared to the previous year. In fall 2015, SOU was up nearly 8% over the

prior year for enrollment of students of color. To enhance and strengthen our recruiting efforts in these areas, we have expanded initiatives such as the Pirates to Raiders, Bulldogs to Raiders, and Konaway Nika Tillicum and Academia Latina pre-college programs. In addition, we have integrated programming specifically designed to enhance our diversity and inclusion through many of the Student Support Initiatives and other programs introduced over the past few years.

SOU places great emphasis on evaluating course and program offerings on an ongoing basis to ensure we help meet the state's educational and workforce development needs. Fall 2016 brings the inaugural class of the Jackson/Josephine Pledge Program, an accelerated baccalaureate program for local high school graduates that affords them substantial tuition discounts and support to reach graduation in three years instead of four. The programs were specifically selected to serve the needs of employers in Jackson and Josephine Counties. We are also in our second year of the Innovation & Leadership Program, a multidisciplinary bachelor's degree program for working professionals who aspire to become leaders within their organizations and communities. This program serves as the pilot experience for our Credit for Prior Learning procedure and was Southern Oregon University's response to the Oregon University System mandate to enhance competency-based learning at all Oregon universities. The Bridge at SOU Program connects the strengths of students to learning outcomes, programs, resources, people, and opportunities at SOU and was specifically designed to provide incoming freshmen in at-risk categories with the resources needed to succeed in their academic careers.

In 2016, Southern Oregon University was selected by the American Association of State Colleges and Universities (AASCU) to be part of the Re-Imagining the First Year project. This is a national project aimed at ensuring success for all students, particularly those who have historically been underserved by higher education: low-income, first-generation, and students of color. With support from the Bill & Melinda Gates Foundation and USA Funds, AASCU created a coalition of 44 member institutions, including SOU, which will collaborate for three calendar years (2016–18) to develop comprehensive, institutional transformations that redefine the first year of college and create sustainable change for student success. All 465 AASCU member institutions across the nation will have access to the resources compiled as a result of this three-year initiative.

Capital construction and physical plant improvements continue at SOU. We saw the completion of the Science Building remodel in 2015–16. Upon conclusion of design work in winter 2016, demolition work began on McNeal Pavilion, SOU's main physical education facility. Work is currently underway for a replacement building as well as a brand-new student fee–funded Student Recreation Facility. The Raider Stadium facility is also currently under renovation, as is our Theatre Arts Building, which will include a 4,500–square-foot addition for the relocated offices of Jefferson Public Radio (JPR).

SOU Athletics programs have seen considerable success in the past few years. In 2015–16, SOU had nine NAIA Scholar Teams, 88 Academic All-Conference student-athletes (sophomores and above), five teams with combined GPAs falling between 3.3 and 3.6, and a cumulative average GPA for all student-athletes of 3.1. SOU ranked sixth in the NAIA all-sports standings in 2015— the highest finish ever for a Cascade Conference school—and eighth in the all-sports standings in 2016, the second-highest finish for a Cascade Conference school. The SOU Raiders Football team made its second straight appearance in the NAIA Football National Championship game in 2016, while the Women's Basketball Team appeared in their first NAIA championship game. In 2015, 12 of 13 sports programs advanced to the postseason in 2015, achieving four conference titles and 21 All-American athlete standings. Southern Oregon University has won five Cascade Conference Coach of the Year Awards. Named Cascade Collegiate Conference Athletic Director of the Year for both 2014–15 and 2015–16, our athletic director was the National Association of College Director of Athletics (NACDA) NAIA Athletic Director of the Year for 2015–16.

SOU's commitment to accessible, affordable, and quality education for our students is supported by our adherence to diligent financial oversight by our administration and Board of Trustees as well as by robust relationships with key partners in the region. We are dedicated to maintaining and strengthening our strong record of service to the State of Oregon, our students, and community.

# Preface

## BRIEF UPDATE ON INSTITUTIONAL CHANGES SINCE THE INSTITUTION'S LAST REPORT

### Governance

With the passing of Senate Bill 270 in 2013, Southern Oregon University and the other six universities that formed the Oregon University System transitioned to governance by local boards of trustees. SOU's Board of Trustees assumed governance of the University in July 2015. Comprising 15 members, the Board of Trustees is authorized to manage the affairs of SOU, including exercising the powers, rights, and privileges legally or implicitly conferred on Southern Oregon University. The Board of Trustees has established all required meeting procedures, committees, bylaws, and policies to perform its functions.

### New Administrative Personnel and Positions

Dr. Mary Cullinan, former president of SOU, left the University in 2014 and was replaced by Dr. Roy Saigo as interim president from 2014 to 2016. Dr. Linda Schott was appointed as president in July 2016. Dr. Jim Klein left the position of provost and vice president for academic and student affairs in August 2014, and Dr. Susan Walsh (former associate provost and director of graduate studies) became provost. Dr. Jody Waters moved into the position of associate provost in August 2014. Mark Denney was hired as associate vice president for budget and planning in 2014. Dr. Karen Stone entered the new position of associate vice president for academic resource management in 2013, and Lisa Garcia Hansen held the position of associate vice president for enrollment and retention from 2014 before departing in 2016. This position remains open, pending review of the position description and search. Jason Catz became SOU's full-time general counsel in 2015. Also in 2015, the director for diversity and inclusion position was created as a direct report to SOU's president. Marjorie Trueblood-Gamble holds this position. In anticipation of the Board of Trustees assuming its role, the Institution searched for and appointed Sabrina Prud'homme to a board secretary position in 2015.

### Structural Changes

In 2013, Student Affairs and Academic Affairs were integrated, resulting in a reduction of seven administrative staff, including the dean of students and vice president for student affairs. Several areas within Student Life were reorganized to achieve a more effective and cost-efficient organizational configuration.

In 2013, under the leadership of the provost and associate provost, the University initiated a series of consultative discussions across academic units to identify ways to restructure academic programs to achieve parity of size of academic units; equity in faculty distribution

and resources; and a more collaborative planning and decision-making environment. The previous structure included a College of Arts & Sciences and two smaller entities: the School of Business and School of Education, each with its own dean. The reorganization eliminated deans and created seven administrative units, each comprising roughly equal faculty FTE:

1. Division of Business, Communication, & the Environment
2. Division of Health, Education, & Leadership
3. Division of Humanities & Culture
4. Oregon Center for the Arts at Southern Oregon University
5. Division of Social Sciences
6. Division of Science, Technology, Engineering, & Mathematics (STEM)
7. Division of Undergraduate Studies

Each division is led by a director, a new administrative role that better meets the collaborative intent of this structure since each director oversees roughly the same size unit and faculty number. The "flat" structure of the academic administrative units advances the institutional priorities of enabling better and more direct communication between the academic divisions and administration; achieves accountability and transparency in management of academic resources; and effects cost savings while achieving stronger integration across academic units. While not primarily a cost-saving effort, the University saved some $250,000 in administrative salaries from the elimination of one associate dean and three dean positions as well as the reduction of faculty release time (through chair duties, many of which are now carried out by directors).

Consolidation of staff into a central Service Center that manages all accounts payable, budget, human resources, payroll, travel, and other financial services has addressed the duplication of services and efforts across campus while also leading to some expenditure reductions.

## Retrenchment

SOU last went into retrenchment in 2007 but emerged with a solid strategic plan and master academic plan, favorable enrollment figures, and an infusion of new faculty and program expansion over several ensuing years. The growth period that followed was disrupted by a significant drop in enrollment in 2012; challenges within Admissions and Enrollment staff and leadership that impacted recruitment and retention; and reductions in state funding. For the next several years, enrollment and state funding continued to decline while internal and external factors affecting the University's financial health intensified. Some of these were: increasing personnel and benefits costs, additional budget pressures due to external factors such as the elimination of the Oregon University System, and a one-time outlay of $2M from the general fund to cover an OUS bad debt policy change in 2013. SOU's 2013 ending fund balance fell below the 5% minimum required by the Oregon State Board of Higher Education, and the University subsequently declared retrenchment. The three-year retrenchment has

been guided by a holistic, intentional, and realistic plan that articulates reductions in costs and increased efficiencies, but also creates opportunities to build programs and operating principles that will carry the Institution into its next strategic planning process.

The retrenchment plan was developed using extensive resources generated during a period of intensive analysis and deliberative consideration of the Institution's capacity and programs. These include the 2012 Capacity Study, the 2013 institution-wide Program Prioritization Process, a workforce productivity study also conducted in 2013, and a Delaware cost study commissioned by OUS in 2014, all of which were further bolstered by lessons gleaned from the previous retrenchment. Administrators have worked closely with campus constituencies to develop a retrenchment plan that builds on existing strengths and resources while adopting new approaches to fiscal management and operations. Seeking to minimize disruptions to students, we have prioritized sound management of faculty and curricular resources, program reduction, and monitoring of internal administrative overhead. Managing faculty resources will be especially critical, as the University will see a large number of faculty retirements in the coming years and will need to balance intentional reinvestment in academic programs with the distribution and number of tenure-track faculty. In addition, significant unaccounted faculty release was identified during this period, underscoring the need for systematic tracking of faculty loading. The implementation of the Faculty Loading Report by the associate vice president for academic resource management has further fostered a culture of accountability and equity for divisional planning, and alignment of institutional capacity with student needs.

The University has either met or exceeded all of its retrenchment targets and has been able to reinvest in certain key areas, including infrastructure, faculty, and facilities. Diligent attention to the retention and success of our students, sound resource management, and greater accountability and transparency have characterized this retrenchment.

## Legislative Funding for Student Success Initiatives

A 2015 legislative action led to an additional $1.2M being made available to SOU over the 2015–17 biennium. For each of the two years, $582,000 was allocated to initiatives that best articulated and supported our goals around student success, a core theme in our mission. A call for proposals went out to all faculty, staff, and students, resulting in the submission of more than 30 proposals, which then underwent a thorough review by members of Faculty Senate, the University Planning Board, and Student Government. SOU's Enrollment Council reviewed the feedback received from these groups and made recommendations to Executive Cabinet. Amounts requested ranged from $1,200 to $120,000. Approved initiatives include a first-year Bridge Program; increased science tutoring in the University's Learning Commons; a Mental Health Library and Digital Mental Health website; a Faculty Writing Fellows seminar; and Curriculum Design Academy. Assessment and evaluation for continued investment will occur over the next academic year with a focus on the student retention rate and effect on overall student success. An additional $250,000 has been set aside every year of retrenchment for continued investment in student success programs.

## The Center for Sustainability and The Farm

Since opening in 2013, SOU's Center for Sustainability has developed into a three-and-one-half-acre working farm designed and managed by students. Located several blocks from the main campus, The Farm integrates disciplinary and practical aspects of sustainability and environmental stewardship, functioning as a hub for education, student and faculty research, and community outreach. It is also a producing farm with its own community-supported agriculture program; a laboratory where students across disciplines can implement knowledge and skills related to sustainability, environmental studies, design principles, and social responsibility; and a leadership academy for future environmental, policy, and scientific leaders. The Farm has become an active site for community partners, and its innovative structure facilitates service-learning opportunities for many SOU programs by providing a place for career exploration and community-based problem solving.

## Other Changes and New Initiatives

- The SOU Honors College opened in 2013 with a 25-student cohort; a community mentor program; and a specialized, academically rigorous curriculum that incorporates community service and learning opportunities that connect students to issues and opportunities in the region, nation, and world.
- The House Experience alternative general education program (2013).
- Implementation of an outcomes-based versus enrollment-based state appropriation funding model, further advancing our goals of supporting at-risk, first-generation, and underrepresented students.
- New enrollment and recruiting strategies, including automated recruited and marketing tools; increased use of targeted social media assets; focused recruiting in key states and markets; the hiring of a full-time recruiter for Portland; and enhanced collection, analysis, and reporting of enrollment data.
- The PEAK (Professional Experience, Achievement, & Knowledge) Program; the Peak student job program implemented in 2013 has created hundreds of discipline-based professional experiences for SOU students.
- The 700-bed North Campus Village residential and dining facility opened in 2013.
- SOU was named the nation's first Bee Campus USA in 2015 and was designated a Tree Campus USA in 2014.

# Standard One

## *Mission, Core Themes, and Expectations*

## EXECUTIVE SUMMARY OF ELIGIBILITY REQUIREMENTS 2 AND 3

### Eligibility Requirement 2: Authority

**The institution is authorized to operate and award degrees as a higher education institution by the appropriate governmental organization, agency, or governing board as required by the jurisdiction in which it operates.**

Southern Oregon University was founded as the Southern Oregon State Normal School in 1926, later named Southern Oregon College (SOC) and Southern Oregon State College (SOSC). The University's authority to operate and award degrees was conferred by the Oregon governor in 1932, when it received full accreditation from the American Association of Teachers Colleges and was renamed the Southern Oregon College of Education. In 1997, it became Southern Oregon University.

### Eligibility Requirement 3: Mission and Core Themes

**The institution's mission and core themes are clearly defined and adopted by its governing board(s) consistent with its legal authorization and are appropriate to a degree-granting institution of higher education. The institution's purpose is to serve the educational interests of its students and its principal programs lead to recognized degrees. The institution devotes all, or substantially all, of its resources to supporting its educational mission and core themes.**

The University's current mission statement was approved by the Oregon University System and Oregon State Board of Higher Education in February 2008. SOU's Board of Trustees received and acknowledged the mission upon assumption of its role in 2015 and will formally assume responsibility to consider and approve any revision or change when the mission is next reviewed and/or revised.

The University's mission statement guides SOU in the design and delivery of degree programs, scholarship and creative activity of the faculty, and partnerships with community, industry, and government agencies. SOU's mission statement and core themes provide the foundation for all operations and program offerings of the University.

# 1.A MISSION

**1.A.1 The institution has a widely published mission statement—approved by its governing board—that articulates a purpose appropriate for an institution of higher learning, gives direction for its efforts, and derives from and is generally understood by its community.**

## Mission Statement

Southern Oregon University is an inclusive campus community dedicated to student success, intellectual growth, and responsible global citizenship.

Southern Oregon University is committed to:

- a challenging and practical liberal arts education centered on student learning, accessibility, and civic engagement;
- academic programs, partnerships, public service, outreach, sustainable practices, and economic development activities that address regional needs such as health and human services, business, and education; and
- outstanding programs that draw on and enrich our unique arts community and bioregion.

**1.A.2 The institution defines mission fulfillment in the context of its purpose, characteristics, and expectations. Guided by that definition, it articulates institutional accomplishments or outcomes that represent an acceptable threshold or extent of mission fulfillment.**

Southern Oregon University fulfills its mission through the integration of a traditional liberal arts curriculum with applied, hands-on learning that connects students with the people, communities, and issues affecting the region and state. We emphasize the uniqueness of the local bioregion and vibrant arts community—both of which make the region distinctive—while drawing on the intersection of these characteristics to define and apply our mission and core themes.

Our first theme, student success, reflects the expectation that our students develop the intellectual and practical skills needed for "personally rewarding vocations and satisfying personal lives." This theme is expressed in indicators that focus on fundamental skills: communication, collaboration, critical thinking, and responsible and ethical information literacy. The second theme, intellectual growth, articulates SOU's commitment to providing opportunities to gain foundational understanding of primary disciplines as well as to extend and refine that knowledge beyond basic understanding. It expresses both the expectation that our faculty be competent, attuned to new developments, and prepared to impart knowledge that defines their disciplines and that they challenge students to extend and apply those

understandings. Responsible citizenship, the third theme, establishes the expectation that students develop the skills and disposition to apply their learning to larger contexts—local, national, and global—and that they be committed to using their education as a catalyst for change and ethical behavior. It also encompasses the expectation that the University will prepare students to negotiate diversity and express cultural competence in both thought and action. Measures related to this theme focus on exposure to practical settings within the framework of learning outcomes as well as the provision of opportunities to encounter worldviews, ethical frameworks, and value systems differing from their own (see Tables 1–3 below).

These core themes inform the Institution as a whole and articulate the expectation that, in a strongly performing university positioned to fulfill its mission, the entire community of students, staff, faculty, and administrators carries this mission forward. Accordingly, both academic and nonacademic (or academic support) programs undergo assessments reflecting the core themes and operational expectations. This procedure reinforces our commitment to supporting learning and development throughout all processes and practices of the University.

# 1.B CORE THEMES

**1.B.1 The institution identifies core themes that individually manifest essential elements of its mission and collectively encompass its mission.**

Southern Oregon University's strong background in liberal arts bolsters a comprehensive curriculum that interweaves a high-quality liberal arts education into its diverse selection of degree programs. Major offerings are available in the social sciences, humanities, STEM fields, arts, and professional programs of business and education. Liberal arts universities such as SOU have mission statements that describe high-level expectations for their students. Mission statements generally do not fully explain the complete identity of an organization; that understanding occurs only with deeper insights into the operations, deliverables, and strategic priorities of the Institution.

Southern Oregon University strives to achieve a balance between providing a liberal arts education and meeting the professional and workforce needs of our region. Indeed, it is our strong liberal arts curriculum that allows us to meet those needs. Prospective employers repeatedly say they desire candidates who possess the ability to think critically, work collaboratively, and solve real-world problems—qualities at the heart of a liberal arts education. These expectations are expressed in our core themes and inform the indicators through which we assess the extent to which our curriculum, academic programs, and support services address these themes.

**1.B.2 The institution establishes objectives for each of its core themes and identifies meaningful, assessable, and verifiable indicators of achievement that form the basis for evaluating accomplishment of the objectives of its core themes.**

In 2013, Southern Oregon University revised the indicators of achievement that were included in the 2011 Year One Report, Standard 1.B Core Themes to better articulate our objectives and identify more effective means of assessing them. These revised indicators better leverage relevant data associated with the identified themes and objectives. A table identifying the core themes and their objectives is included below.

## Theme 1: Student Success

*Table 1: Objectives and Indicators of Theme One*

| Students will be prepared to: | Indicator |
|---|---|
| Communicate effectively using Standard American English in written and oral communication. | **DIRECT:** Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education (written). <br><br> **DIRECT:** Random sampling of exiting seniors' writing samples will indicate 70% of students meet or exceed senior-level writing proficiencies as defined by an institutional writing rubric. <br><br> **INDIRECT:** Students will self-report the number of opportunities to practice writing on the National Survey of Student Engagement (NSSE); (NSSE Benchmark: Level of Academic Challenge (LAC)), and results will be consistent with or exceed 2009 findings. <br><br> **DIRECT:** Demonstrated through the senior capstone project, 70% of students will meet or exceed senior-level oral communication proficiencies as defined by institutional rubrics. <br><br> **DIRECT:** As part of each program review, programs will define, design, and identify embedded assessments to determine the degree of students' success at communicating effectively. Departments establish their criteria, gather data, and prescribe the necessary actions when criteria are not met. |

| | |
|---|---|
| Collaborate with others to achieve a common goal. | **DIRECT:** The continuous development of collaborative skills will be assessed in the first-year seminar and at the exit point using a performance task and institutional rubric adopted by the Association of American Colleges & Universities (AAC&U). |
| | **INDIRECT:** Students will self-report the number of opportunities to collaborate on NSSE (NSSE Benchmark: Active and Collaborative Learning (ACL)), and results will be consistent with or exceed 2009 findings. |

| Students will be prepared to: | Indicator |
|---|---|
| Use critical and creative thinking to solve abstract and applied problems. | **DIRECT:** Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education (critical thinking). |
| | **DIRECT:** 70% of graduating students will meet or exceed senior-level critical thinking proficiencies as defined by an institutional rubric derived from the AAC&U critical thinking rubric. |
| | **DIRECT:** As part of each program review, programs will define, design, and embed assessment to determine the degree of students' success at critical thinking. Departments establish their criteria, gather data, and prescribe the necessary actions when criteria are not met. |
| | **INDIRECT:** Students will self-report the number of opportunities to practice writing on NSSE (NSSE Benchmark: Level of Academic Challenge (LAC)), and results will be consistent with or exceed 2009 findings. |

| | |
|---|---|
| Access and use information resources effectively and ethically (information literacy). | **DIRECT:** Collegiate Learning Assessment (CLA) findings will maintain at 70% or above for value-added gains of SOU education (information literacy).<br><br>**DIRECT:** In an institutional assessment of information literacy, first-time and full-time freshmen students' performance will demonstrate a value-added gain of 10% or more as measured on a pre- and post-assessment. |

## Theme 2: Intellectual Growth

***Table 2: Objectives and Indicators of Theme Two***

| Students and faculty will: | Indicator |
|---|---|
| Extend knowledge of human cultures and the physical and natural world through the study of the arts & humanities, social sciences, and sciences.<br><br>**Note:** This objective was restated as: *Understand and apply knowledge within the arts, humanities, social sciences, and sciences as part of a University Studies curriculum.* | **DIRECT:** Through the use of embedded assessments, students will demonstrate a continued growth of broad general knowledge.<br><br>**DIRECT:** University Seminar faculty will maintain currency in the discipline taught, including service to the departmental and institutional administrative, committee, and student support and retention activities. These contributions will be reported annually in the Faculty Professional Activity Report. |
| Integrate and apply advanced knowledge and skills in one (or more) specialized area(s) of study. | **DIRECT:** Students' knowledge in a specific (major) discipline will be assessed and evaluated by each program. Statistics on students' knowledge will be reported to the Institution on a regular schedule. Program-level outcome assessments may include content exams, capstone analyses, final projects, and portfolios. Departments will demonstrate (through their academic program review) a consistent pattern of students' academic growth in program outcomes at 70% or better.<br><br>**DIRECT:** Major program faculty will make direct |

| | contributions to the local regional, national, and international societies through scholarly activity (contributions will be reported annually in the Faculty Professional Activity Report). |
|---|---|

## Theme 3: Responsible Citizenship

*Table 3: Objectives and Indicators of Theme Three*

| Students will be prepared to: | Indicator |
|---|---|
| Apply knowledge, skills, and ethical inquiry to practical problems locally and globally. | **DIRECT:** Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education.<br><br>**DIRECT:** Students in House cohorts and the Honors College will demonstrate the ability to solve a local problem and extend that solution to a global level.<br><br>**INDIRECT:** Students will self-report on the NSSE the number of opportunities to engage in both Enriching Educational Experiences (NSSE Benchmark: Enriching Educational Experiences (EEE)) and community-based learning experiences while enrolled at SOU (NSSE Benchmark: ACL). Results will be consistent with or exceed 2009 findings.<br><br>**DESCRIPTIVE:** Report total number of courses requiring community-based learning; report total number of credit hours earned annually in CBL courses. |
| Understand and respond responsibly to worldviews and cultural practices different from one's own. | **DIRECT:** 90% of all academic programs will identify within their program course offerings an emphasis on responsible worldviews and cultural practices as reported within the assessment management system (TracDat).<br><br>**INDIRECT:** Students will self-report on the NSSE the number of opportunities to engage in Enriching Educational Experiences (NSSE Benchmark: Enriching |

|  | Educational Experiences (EEE)). Results will be consistent with or exceed 2009 findings.<br><br>**INDIRECT:** The CLA allows institutions to ask nine institutional-specific questions. SOU has a question in the CLA to determine students' perceptions of their personal development of ethical and moral standards as it relates to the ability to respond responsibly to worldviews and cultural practices different from their own. |
|---|---|

# Standard Two

*Resources and Capacity*

## EXECUTIVE SUMMARY OF ELIGIBILITY REQUIREMENTS 4–21

Eligibility Requirement 4: Operational Focus and Independence

**The institution's programs and services are predominantly concerned with higher education. The institution has sufficient organizational and operational independence to be held accountable and responsible for meeting the Commission's standards and eligibility requirements.**

Southern Oregon University is a post-secondary degree-granting institution providing both undergraduate and graduate education. It operates under the purview of the SOU Board of Trustees and is guided by its mission and core themes, which are approved by the Northwest Commission on Colleges and Universities (NWCCU).

These core themes are as follows:

- Student Success: SOU students will be prepared for personally rewarding vocations and satisfying lives by developing intellectual and practical skills.
- Intellectual Growth: SOU students will acquire and expand upon both broad-based general and specialized knowledge in one or more specific disciplines.
- Responsible Citizenship: SOU students will be prepared to serve in personally and socially responsible roles, both locally and globally.

SOU has sufficient independent organizational and operational structures to adhere to NWCCU's requirements and standards as demonstrated by submission of all required institutional reports.

Eligibility Requirement 5: Nondiscrimination

**The institution is governed and administered with respect for the individual in a nondiscriminatory manner while responding to the educational needs and legitimate claims of the constituencies it serves as determined by its charter, mission, and core themes.**

Southern Oregon University adheres to the intent of nondiscrimination laws and policies as both a guiding principle and an operational mandate. The University embraces the following commitments:

- to be a welcoming community committed to inclusive excellence and celebration of difference;
- to pay close attention to the cultural differences learners bring to the educational experience;
- to focus on intellectual and social development through the learning outcomes of knowledge, skills, responsibilities, and integrative abilities a 21st century university graduate must achieve; and
- to challenge each student to achieve academically and contribute to learning in partnership with members of the campus and the larger community.

In addition to coursework across the sciences, humanities, and social sciences, these commitments are clearly reflected throughout the University Studies curriculum, SOU's general education program, which requires students to achieve competencies in communication, critical thinking, information literacy, citizenship, social responsibility, diversity, and global awareness. These commitments are also reflected in the University's focus on applied learning and civic engagement, which develop students' understanding of theory and skills while facilitating their application to community, national, and global issues.

SOU's director of diversity and inclusion serves on the President's Cabinet; a Bias Response Team, whose mandate is to ensure an inclusive, bias-free campus through education and responsive action to bias-related incidents; and a five-member Title IX Team that investigates, remediates, and adjudicates gender-related misconduct, bias, harassment, and sexual violence. The University has comprehensive policies on diversity; [Exhibit 2.EligReq.5 Diversity] affirmative action and equal employment; [Exhibit 2.EligReq.5 Affirmative Action] and equal opportunity, harassment, and sexual misconduct. [Exhibit 2.EligReq.5 EEO and Misconduct]

Beyond nondiscrimination policies and procedures, SOU provides students, staff, and faculty with abundant resources that address the needs of its diverse constituents; provide advocacy and protection; and enhance cultural competence. These include:

- Student resource centers: Multicultural Resource Center, Queer Resource Center, Women's Resource Center, Commuter Resource Center, and Veterans Resource Center
- Myriad student clubs and groups: Native American Student Union, Black Student Union, Latino Students Union, Ho'opa'a Hawaii Club, and International Students Association
- Academic programs: Gender, Sexuality, & Women's Studies; Native American Studies; and International Studies
- Curricular offerings across all academic programs that meet standards of Core Theme/Standard J: diversity and global awareness

## Eligibility Requirement 6: Institutional Integrity

**The institution establishes and adheres to ethical standards in all of its operations and relationships.**

Southern Oregon University is dedicated to fostering an environment that promotes ethical research standards and academic integrity in all of its operations and relationships. All public employees of SOU are covered by the State of Oregon's government ethics laws. The University's [Policies Web Repository website](#) provides an index of policies, Internal Management Directives (IMDs), union contracts, and University and State of Oregon administrative rules related to ethical and lawful conduct by employees, including policies on sexual harassment and consensual relations. In addition, various other policies related to student and employee conduct are posted on the web pages of the relevant authority. Policies are reviewed and sent out for all-campus comment to ensure adequate input and quality; policy changes are then disseminated campuswide.

As of July 1, 2015, SOU became a separate independent entity as part of the decentralization of the former OUS system (Oregon Legislative Senate Bill 270). Prior to July 1, 2015, SOU underwent an annual independent audit as part of the OUS system to ensure compliance with Generally Accepted Accounting Principles. After July 1, 2015, SOU will undergo an independent audit as a separate entity of the State of Oregon.

## Eligibility Requirement 7: Governing Board

**The institution has a functioning governing board responsible for the quality and integrity of the institution and for each unit within a multiple-unit institution to ensure the institution's mission and core themes are being achieved. The governing board has at least five voting members, a majority of whom have no contractual or employment relationship or personal financial interest with the institution.**

The Board of Trustees of Southern Oregon University commenced its authority on July 1, 2015, and has established committees, bylaws, policies, and meeting dates to conduct its work. The roles, responsibilities, and authority of the institutional governing board are clearly defined and widely communicated in the authorizing legislation (SB270), state statutes, and the board's bylaws. With the exception of the University president, trustees are appointed by the Oregon governor and are subject to confirmation by the Oregon Senate in the manner prescribed by law. The Board of Trustees comprises 15 members who have no contractual, employment, or financial interest in the Institution. The Southern Oregon University president is an ex officio, nonvoting member of the SOU governing board.

## Eligibility Requirement 8: Chief Executive Officer

**The institution employs a chief executive officer who is appointed by the governing board and whose full-time responsibility is to the institution. Neither the chief executive officer nor an executive officer of the institution chairs the institution's governing board.**

The president is the chief executive officer of Southern Oregon University and is appointed by the SOU Board of Trustees. The president's charge is to direct and oversee all aspects of the University and its operations. The SOU Board of Trustees selects, evaluates, and reviews the

terms of the president's appointment, performance, and compensation. Neither the president nor any other executive officer of SOU chairs the Board of Trustees.

## Eligibility Requirement 9: Administration

**In addition to a chief executive officer, the institution employs a sufficient number of qualified administrators who provide effective leadership and management for the institution's major support and operational functions and work collaboratively across institutional functions and units to foster fulfillment of the institution's mission and achievement of its core themes.**

In addition to the president, the University employs a provost; vice president of academic and student affairs; vice president of finance and administration; vice president of development and executive director of the SOU Foundation; associate vice president for budget and planning; associate vice president for enrollment and retention (currently vacant); associate vice president for academic resource management; and associate provost. These positions are represented on SOU's Executive Council, and the provost and vice presidents serve on the President's Executive Cabinet. Each administrative position is held by a qualified and credentialed individual who is evaluated annually and who demonstrates commitment to the Institution's mission and core themes by fulfilling the terms of their respective positions and working collaboratively to ensure institutional success.

## Eligibility Requirement 10: Faculty

**Consistent with its mission and core themes, the institution employs and regularly evaluates the performance of appropriately qualified faculty sufficient in number to achieve its educational objectives, establish and oversee academic policies, and ensure the integrity and continuity of its academic programs wherever offered and however delivered.**

The University conducts rigorous national searches for its full-time professorial and professional faculty before selecting candidates who demonstrate the level of excellence in teaching, research, and service required for the Institution to carry out its mission. The seven-year average FTE for the period 2009–16 is 226 full-time faculty FTE and a 17.7 student-to–full-time faculty FTE. Faculty are regularly evaluated for adherence to disciplinary, program-specific, and institutional expectations. Faculty comprise the majority of members on campus academic policy-making committees. The Provost's Office regularly establishes and reviews faculty and evaluation practices as well as ensuring compliance with all University regulations, including those identified in the bylaws of the Faculty Senate Constitution and Collective Bargaining Agreement.

## Eligibility Requirement 11: Educational Programs

**The institution provides one or more educational programs that include appropriate content and rigor consistent with its mission and core themes. The educational program(s) culminate in achievement of clearly identified student learning outcomes and lead to collegiate-level degree(s) with degree designation consistent with program content in recognized fields of study.**

SOU offers a variety of degree programs that advance the University's mission and core themes, as evidenced by annual assessment of programmatic offerings and practices and the extent to which they fulfill core themes that map to the mission. The Institution consists of seven academic divisions:

1. Division of Business, Communication, & the Environment
2. Division of Health, Education, & Leadership
3. Division of Humanities & Culture
4. Oregon Center for the Arts at Southern Oregon University
5. Division of Social Sciences
6. Division of Science, Technology, Engineering, & Mathematics (STEM)
7. Division of Undergraduate Studies

The Division of Undergraduate Studies oversees SOU's general education program, University Studies. Students seeking baccalaureate degrees complete a total of 180 credit hours, including 60 credit hours of general education and 60 hours of upper division coursework. Curricular requirements are clearly articulated in the annually updated SOU Catalog as well as in multiple advising resources distributed online, within program advising activities, and by professional advising staff. All courses of study offered at the University lead to approved degrees or certificates. In addition to meeting standards prescribed by NWCCU, eight programs are accredited by an accrediting organization.

## Eligibility Requirement 12: General Education and Related Instruction

**The institution's baccalaureate degree programs and/or academic or transfer associate degree programs require a substantial and coherent component of general education as a prerequisite to or an essential element of the programs offered. All other associate degree programs (e.g., applied, specialized, or technical) and programs of study of either 30 semester or 45 quarter credits or more for which certificates are granted contain a recognizable core of related instruction or general education with identified outcomes in the areas of communication, computation, and human relations that align with and support program goals or intended outcomes. Bachelor and graduate degree programs also require a planned program of major specialization or concentration.**

Students are required to complete 180 credit hours for the baccalaureate degree, 60 credits of which comprise general education, known at SOU as University Studies. The 10 strands that form the foundation of this curriculum express goals and outcomes that map directly to SOU's mission and core themes. The three components are:

1. Foundations (Strands A–D)
2. Explorations (Strands E–G)
3. Integrations (Strands H–J)

Students complete one class for each strand, with the exception of the Explorations sequence (E, F, G), for which students complete three classes or a certain number of credit hours (if a transfer student). Foundational and Explorations sequence (Strands A, B, C, D) classes are lower division (100- and 200-level), and Integration classes (Strands H, I, and J) are upper division (300- and 400-level). The overall scheme of the University Studies curriculum provides both breadth (Foundations/Explorations) and depth (Integration). In addition, the foundational goals of communication, critical thinking, and informational literacy are completed as part of the required first-year experience, and each student must demonstrate competence in quantitative reasoning. Students seeking a master's degree complete between 45 and 90 credits of approved graduate-level coursework.

## Eligibility Requirement 13: Library and Information Resources

**Consistent with its mission and core themes, the institution maintains and/or provides access to library and information resources with an appropriate level of currency, depth, and breadth to support the institution's programs and services wherever offered and however delivered.**

In accordance with the SOU mission, Hannon Library preserves and provides access to print-based and electronic information resources to ensure student success, intellectual growth, and responsible global citizenship. The transition to digital information over the past decade has greatly increased student and faculty access to information resources. Despite budgetary constraints, Hannon Library provides an ever-expanding range of innovative services and information resources in multiple traditional and electronic formats. Librarians select materials to meet the instructional, informational, and research needs of the University. Highest priority is given to materials that support undergraduate instruction.

The University Library's physical collections include 340,015 volumes; 687 print journal subscriptions; 295,618 state and federal government publications; 16,980 microfilm reels; 793,244 microfiche; 10,131 maps; 4,004 prints; 1,796 audio recordings; and 10,271 video recordings.

The library follows a comprehensive strategic plan developed for 2009–13 that articulates four main guiding themes:

- to seek opportunities to partner and collaborate;
- to engage students, faculty, and community in building and sustaining working relationships;
- to develop the library as a hub for learning and a campus focal point for social and cultural events to develop a stronger campus community; and
- to use and provide instruction on new technology tools that transition the library and SOU to an increased online environment.

## Eligibility Requirement 14: Physical and Technological Infrastructure

**The institution provides the physical and technological infrastructure necessary to achieve its mission and core themes.**

The University operates two campuses: the main Ashland campus and the Higher Education Center in Medford. The Southern Oregon University campus in Ashland sits on 178 acres of land and consists of 15 major academic and administrative buildings. The SOU Medford campus consists of one major facility that includes laboratories, classrooms, and administrative offices, which are colocated in a facility shared with Rogue Community College (RCC). Approximately $500,000 to $1 million is spent annually on campus maintenance repairs. These are funded biannually by the state, and the total amount varies based on the allocation. The University has the appropriate infrastructure necessary to carry out its mission as well as effective planning processes to monitor use and gauge future and existing needs. Current renovation and remodeling initiatives have taken some facilities out of operational status, but adequate temporary accommodations exist to house and provide support during these processes.

## Eligibility Requirement 15: Academic Freedom

**The institution maintains an atmosphere in which intellectual freedom and independence exist. Faculty and students are free to examine and test all knowledge appropriate to their discipline or area of major study as judged by the academic/educational community in general.**

Faculty members at SOU are entrusted with broad individual academic freedom to pursue and teach the content within their courses and discipline and are free to discuss a variety of ideas in the context of learning and scholarship. Academic freedom is protected for all University faculty under SOU policy, which states "All teachers in Department institutions are entitled to freedom in the classroom in discussing subjects." Faculty members are aware that the concept of academic freedom is accompanied by the equally demanding concept of academic responsibility and maintaining appropriate standards of scholarship and instruction.

Academic freedom is further promoted in Article 1, Sections C and E of the Associated Professors of SOU Collective Bargaining Agreement, which states, "The teacher is entitled to

freedom in the classroom in discussing the subject of their courses, courses, or contemporaneous topics that may impact the subject or methods of their courses, as well they are entitled to the selection of course materials and to promote activities that encourage the broadening of student inquiry and investigation into areas and topics related to their courses. Faculty have the concurrent responsibility to refrain from introducing topics or materials that are in no sense, broad or narrow, germane to their course objectives, disciplinary methods, or course content." The CBA also protects the rights of faculty members as citizens from institutional censorship or discipline.

Rights of students are articulated in the Student Code of Conduct and the University's policies on speech activities, both of which articulate the right to speak without restraint while safeguarding members of the SOU community from speech acts or activities that impede the normal operations of the Institution, inflict harm, or restrict the rights of others.

## Eligibility Requirement 16: Admissions

**The institution publishes its student admission policy, which specifies the characteristics and qualifications appropriate for its programs, and it adheres to that policy in its admissions procedures and practices.**

SOU distributes information regarding admissions standards and practices via the SOU Catalog, web resources for Admissions and Enrollment Services, and individual programs. These requirements are codified in the SOU Catalog, which is available on the University website. The Office of Admissions disseminates admission requirements information through its website and a variety of print publications. Individual academic programs, the University Registrar's Office, and Academic Support Programs publish and distribute graduation requirements via websites, print materials, and individual interventions with students during advising and other academic support functions. All such policies are in full compliance with state and federal regulations and guidelines.

## Eligibility Requirement 17: Public Information

**The institution publishes in a catalog and/or on a website current and accurate information regarding: its mission and core themes; admission requirements and procedures; grading policy; information on academic programs and courses; names, titles, and academic credentials of administrators and faculty; rules and regulations for student conduct; rights and responsibilities of students; tuition, fees, and other program costs; refund policies and procedures; opportunities and requirements for financial aid; and the academic calendar.**

SOU Admissions and the Registrar's Office work with Academic Affairs to maintain an academic-year course catalog that is replicated and updated annually on the University's website. The Catalog contains all required elements: admission requirements and procedures; grading policy; information on academic programs and courses; names, titles, and academic

credentials of administrators and faculty; rules and regulations for student conduct; rights and responsibilities of students; tuition, fees, and other program costs; refund policies and procedures; opportunities and requirements for financial aid; and the academic calendar.

## Eligibility Requirement 18: Financial Resources

**The institution demonstrates financial stability with sufficient cash flow and, as appropriate, reserves to support its programs and services. Financial planning reflects available funds, realistic development of financial resources, and appropriate risk management to ensure short-term solvency and long-term financial sustainability.**

Financial stability has been a significant concern at SOU, evidenced most prominently by the declaration of retrenchment in 2014 following the drop in the University's fund balance below the level considered acceptable by the former State Board of Higher Education. However, through careful management of resources, program reduction, furloughs, and other cost-saving measures—coupled with strategic planning and investment—metrics established in the institutional retrenchment plan have all been met or exceeded.

In recent years, the lack of stability in state appropriations to the University has posed challenges, although funding has recently improved and has had a significant positive impact on SOU's ability to stabilize operations. Reliance on other revenue streams such as tuition and fees to support ongoing expenditures, however, has placed greater emphasis on recruitment and retention of students. While managing costs continues to be a high priority, SOU has met these challenges through a variety of targeted changes to tuition pricing structures and methodologies; investment in student success strategies supported by focused one-time funding from the state; administrative and structural reorganization; and a shift to an outcomes-based funding model from one that was primarily calculated based solely on enrollment.

## Eligibility Requirement 19: Financial Accountability

**For each year of operation, the institution undergoes an external financial audit in a reasonable timeframe by professionally qualified personnel in accordance with generally accepted auditing standards. Results from the audit, including findings and management letter recommendations, are considered in a timely, appropriate, and comprehensive manner by the administration and governing board.**

Prior to July 1, 2015, SOU underwent an annual independent audit as part of the OUS system to ensure compliance with generally accepted accounting principles. Beginning on July 1, 2015, SOU now undergoes an independent audit as a separate entity of the State of Oregon. In addition, all of the University's fiscal operations and corresponding internal controls are now subject to review by the Institution's Internal Audit Office, which reports the SOU president and is responsible for reporting to the SOU Board of Trustees. Prior to July 1, 2015, the University collaborated with the OUS Internal Audit Division to provide input into the audit plan,

assemble necessary data for audits, ensure recommendations are reasonable and practical, and implement recommendations as appropriate. Starting July 1, 2015, University management began collaborating with the SOU Internal Audit Office when performing these functions.

## Eligibility Requirement 20: Disclosure

**The institution accurately discloses to the Commission all information the Commission may require to carry out its evaluation and accreditation functions.**

Southern Oregon University regularly reviews NWCCU policies and procedures and works with NWCCU staff to ensure reporting and compliance requirements are fulfilled and consistent with the expectations of the Commission. The University has internal systems to track requirements and provide reports and updates in a timely manner. Designated the Institution's accreditation liaison officer (ALO), the associate provost coordinates and performs these functions.

## Eligibility Requirement 21: Relationship with the Accreditation Commission

**The institution accepts the standards and related policies of the Commission and agrees to comply with these standards and policies as currently stated or as modified in accordance with Commission policy. Further, the institution agrees that the Commission may, at its discretion, make known the nature of any action, positive or negative, regarding the institution's status with the Commission to any agency or members of the public requesting such information.**

SOU designates an accreditation liaison officer (ALO) to ensure compliance with NWCCU and provide all required information to keep the Institution's accreditation in good standing. The ALO completes NWCCU's annual report and monitors institutional changes to make sure they meet accreditation requirements.

# 2.A GOVERNANCE

**By documenting the adequacy of its resources and capacity, the institution demonstrates the potential to fulfill its mission, accomplish its core theme objectives, and achieve the intended outcomes of its programs and services, wherever offered and however delivered. Through its governance and decision-making structures, the institution establishes, reviews regularly, and revises, as necessary, policies and procedures that promote effective management and operation of the institution.**

2.A.1 **The institution demonstrates an effective and widely understood system of governance with clearly defined authority, roles, and responsibilities. Its decision-making structures and processes make provision for the consideration of the views of faculty,**

**staff, administrators, and students on matters in which they have a direct and reasonable interest.**

Significant changes to higher education have occurred in Oregon since the time of Southern Oregon University's last accreditation. These include the 2011 passage of Senate Bill 242, which established each of the seven Oregon public universities as an independent public university with its own autonomous governing board, and Senate Bill 80 in 2015, which dissolved the Oregon University System (OUS), Office of the OUS Chancellor, and Oregon State Board of Higher Education (OSBHE). SOU previously operated as a member of the OUS statewide system under the oversight of the OSBHE with the SOU president reporting directly to the OUS chancellor. As of July 1, 2015, SOU's president now reports to the Board of Trustees of Southern Oregon University (hereinafter, SOU Board of Trustees), as established in Section 9 of Oregon SB270 and the bylaws of the SOU Board of Trustees. The president continues to represent the Institution to its constituencies.

As stated in the Faculty Constitution and Bylaws, the president and senior administrators— including the provost, vice president for finance and administration, vice president for development, associate vice president (AVP) for academic resource management, associate provost, vice president for enrollment management, and division directors—are evaluated annually by the campus community.

Three governing bodies within the University structure report directly to the president:

## 1. Faculty Senate

Faculty Senate oversees the development of academic policies and curriculum. The senate is composed of membership from each of the seven academic divisions, plus five at-large members, all elected by the faculty. The purview of the Faculty Senate is stated in four principles in the [bylaws](#):

a. Advice to the President. The faculty shall have the right to act upon and advise the president on all matters of educational policy within the limits prescribed by federal and state law. Educational policy pertains to but is not limited to such fundamental matters as curriculum, methods of instruction, program evaluation, facilities, materials for instruction, standards for admission and retention of students, and criteria for granting of degrees. This power also includes those aspects of student life that relate directly to the educational process, such as the establishment of regulations on extracurricular activities and freedom of action and expression.

b. Participation in Faculty Appointments, Tenure, and Promotion. The faculty have the right to participate actively in the establishment and implementation of all policies and procedures related to faculty appointments, faculty tenure, and faculty promotion.

c. Participation in Selection of Academic Officers. Presidents, academic division directors, and other academic administrative officers must have the confidence of the rest of the faculty and should be qualified for full faculty membership by training, experience, and continued interest in teaching and research. Therefore, the faculty make recommendations to the University president regarding the selection of such officers, the evaluation of their performance, and the creation or abolition of their offices.

d. Participation in Budgetary Matters. Budgetary matters have a profound effect upon educational policies and practices and the public image of the University. Therefore, the faculty review college operations and make recommendations to appropriate authorities regarding budget planning within the University and the allocation of institutional funds within Southern Oregon University.

Faculty Senate also convenes General Senate Committees and Councils: Academic Policies Committee, Academic Standards Committee, University Assessment Committee (UAC), Curriculum Committee, Faculty Development Committee, Financial Aid & Awards Committee, Honors Council, Inter-Collegiate Athletics Committee, International Affairs Council, Library Committee, Student Affairs Committee, Teacher Education Committee, Graduate Council, and University Studies Committee (USC).

Each committee includes faculty representatives and generally one or more administrative contacts who serve in a nonvoting, ex officio capacity.


## 2. The University Planning Board (UPB)

The University Planning Board (UPB) was created in 2013 to provide a vehicle that models shared governance. The charge of the UPB is to create effective collaboration between University entities involved in University planning and resource allocations, providing transparency around strategic planning and budgeting. Specifically, the board considers strategic planning goals and objectives; examines strategic investments and allocation for programmatic, physical, and technology needs; and reviews priorities for capital construction and deferred maintenance. The board's membership consists of representation from each academic division (previously, each school or college), Hannon Library, Service Employees International Union (SEIU), and Associated Professors of SOU (AP:SOU); one graduate and one undergraduate student; and the chairs of its sub-committees (Budget Council, Enrollment Council, Institutional Assessment & Accreditation, Facilities Planning & Utilization, Diversity & Inclusion, and Student Success Committee).

Serving as ex officio members and/or consultants are the provost and vice president for academic and student affairs; vice president of finance and administration; executive assistant to the vice president of finance and administration; and one Faculty Senate designee. During the 2015–16 academic year, revisions were made to the Faculty Senate bylaws language describing the UPB's charge and membership to reflect the academic reorganization

implemented in 2014 as well as the addition of the Diversity and Inclusion Committee as a UPB subcommittee.

## 3. Associated Students of SOU (ASSOU)

The Constitution of the Associated Students of Southern Oregon University (ASSOU) defines its mission as:

- To work to provide students with resources that enrich the collegiate experience, encourage the exchange of ideas, and foster a positive campus environment through the funds collected by the student fee. ASSOU shall represent the interests and voice of the students regarding University-, state-, and national-level issues; and ASSOU shall always strive to steer Southern Oregon University toward a path of longevity and success.

ASSOU is organized into three branches: Executive, Legislative, and Judicial. The purview of each is summarized as follows:

- The Executive Branch strives to engage students in meaningful involvement, foster activism through the lens of social accountability, and practice and encourage responsible leadership.
- The Legislative Branch works to inform and outreach, develop student leaders, make sound and fair decisions, represent student voices, and promote equality and diversity on campus.
- The Judicial Branch exists to interpret the nature and letter of the governing documents of ASSOU, work on and help facilitate conduct boards, protect the accountability and integrity of ASSOU and its officers, and provide mediation and advice in disputes involving any member of the student body.

The Associated Students have an autonomous process to determine the setting of the Student Incidental Fee and funding of programs supported by the fee. The fee, however, must be submitted to the University president for approval before being included in the recommendations for tuition and fees presented to the SOU Board of Trustees for review and approval.

The Student Tuition Advisory Committee (STAC) comprises an equal number of students and faculty/administrators. Each year, the STAC reviews budget, fees, and other elements to provide a recommendation to the president on tuition rates.

More information about the Associated Students of Southern Oregon University can be found on their website.

These relationships between faculty, students, staff, and administrators are further articulated in a Shared Governance Policy statement that illustrates the inclusive governance process

employed in decision making and planning. Participatory governance, based on a commitment to open and transparent communication, has provided institutional strength and sustained SOU through difficult times.

## Southern Oregon University's Policy Repository

In June 2009, the University adopted a standard format for policies. Those who wish to view the format template or get help preparing a policy document can reference the University policies website. All new policies are written in this format, and eventually all policies will be revised to match this template. For some period of time, both old and new formats will coexist. The specific procedure for developing and revising SOU policies is described in three documents included in the Policy Templates, Guidelines, and Resources. A policy review flowchart, additional policy guidelines, and other writing tips are also included. Pursuant to Section 170 of SB270, hundreds of rules and policies of the Oregon State Board of Higher Education and Oregon University System were transferred to SOU on July 1, 2015. These numerous transferred policies are published on the SOU website and will be transitioned over time into a format consistent with that adopted in 2009.

## Collective Bargaining Agreements

Southern Oregon University classified staff are represented by a systemwide Collective Bargaining Unit, the Service Employees International Union. The faculty are represented by the Associated Professors of Southern Oregon University. The Collective Bargaining Agreement (CBA) [Exhibit 2.A.1 Faculty Collective Bargaining Agreement] details terms for compensation and workload issues in addition to other policy elements.

2.A.2 **In a multi-unit governance system, the division of authority and responsibility between the system and the institution is clearly delineated. System policies, regulations, and procedures concerning the institution are clearly defined and equitably administered.**

As of July 1, 2015, Southern Oregon University is no longer a member of a statewide university system. Concurrent with the SOU Board of Trustees' assumption of governance authority for the University, the Oregon University System and Oregon State Board of Higher Education were abolished. The SOU Board of Trustees now holds the authority for University governance.

With the closure of the OUS and OSBHE, the Oregon Legislative Assembly lodged a specified set of responsibilities with the previously established Higher Education Coordinating Commission (HECC) in an effort to promote the statewide coordination of the state's public education goals.

The HECC's specified statutory authorities include:

- developing biennial budget recommendations for public postsecondary education in Oregon;

- making funding allocations to Oregon's public community colleges and public universities;
- approving new academic programs for the public institutions;
- allocating Oregon Opportunity Grants (state need-based student aid);
- authorizing degrees proposed by private and out-of-state (distance) providers;
- licensing private career and trade schools;
- overseeing programs for veterans; and
- implementing other legislative directives.

The HECC exercises only those powers, duties, and functions expressly granted by the Oregon Legislative Assembly and, except as otherwise expressly provided by law, all other authority over the University resides with the SOU Board of Trustees.

In addition, SOU participates in the Oregon Public University Council of Presidents and the Oregon Public University Council of Provosts. Although governance authority and responsibility at each university now rest at the institutional level, there remains a need for coordination, collaboration, and communication among the seven Oregon public universities. The respective membership of each comprises the presidents and provosts of each of the seven Oregon public universities. Through the Council of Presidents, each of the Oregon public universities meets to foster collaboration and coordination among the Oregon public universities with regard to legislative advocacy; internal and external communications; and other operational matters. Similarly, the Council of Provosts meets to further cooperation among the seven universities, with a particular emphasis on matters related to academic policy, student achievement, and academic-related operations.

**2.A.3 The institution monitors its compliance with the Commission's Standards for Accreditation, including the impact of collective bargaining agreements, legislative actions, and external mandates.**

SOU designates the associate provost and director of graduate studies as the University's accreditation liaison officer (ALO). The ALO completes NWCCU's annual report and carries out other accreditation requirements. The ALO chairs the Accreditation Steering Committee, which is charged with compliance with the Commission's Standards for Accreditation as they relate to all internal and external actions and policies of the University. Membership on the Accreditation Steering Committee may change, depending on the year in the accreditation cycle, but generally includes key personnel such as the provost and vice president for academic affairs; vice president for finance and administration; director of institutional research; and others as needed to ensure SOU adheres to standards for accreditation. For the preparation of the Year Seven Report, the Accreditation Steering Committee included:

- Chair: Jody Waters, Associate Provost & Director of Graduate Studies
- Lee Ayers, Director of Undergraduate Studies

- Deborah Brown, Director of University Seminar
- Jeffrey Gayton, University Librarian & Director of the Learning Commons
- Jim Hatton, Mathematics & Chair of the University Assessment Committee
- Craig Morris, Vice President for Finance & Administration
- Kristin Nagy Catz, Director of University Assessment
- Chris Stanek, Director of Institutional Research
- Vicki Suter, Director of the Center for Instructional Support
- Susan Walsh, Provost, Academic & Student Affairs

Representing administration, the assistant vice president for academic resource management works with SOU's general counsel and Human Resource Services to ensure compliance with the Faculty Collective Bargaining Agreement and resolve disputes that may occur regarding the CBA. Faculty are represented by the Associated Professors of Southern Oregon University, and classified staff are represented by the Service Employees International Union.

With the transition to self-governance, the University also established an Office of the General Counsel. The general counsel assists personnel referenced above with the review and management of matters related to collective bargaining agreements, legislative actions, and external mandates. Legislative actions and external mandates from the state legislature and Higher Education Coordinating Commission are disseminated to SOU's Board of Trustees and campus through the Statewide Provosts Council, Vice Presidents of Finance & Administration Council, and Legislative Advisory Council. The president; president's chief of staff and director of government relations; Provost's Office, Finance & Administration (FAD) Office; and SOU's general counsel work together to ensure policies and procedures and all aspects of University operations are in compliance with legislative actions and external mandates.

The Office of Financial Aid ensures compliance with US Department of Education requirements for federal student aid, work-study, and other student employment requirements. The Office of Grants and Sponsored Programs ensures compliance with IRS/tax codes as well as with federal requirements for the use of animals and human subjects. The Title IX Team ensures compliance with Title IX, and Human Resource Services does so with both Title IX and Title VII.

**2.A.4 The institution has a functioning governing board consisting of at least five voting members, a majority of whom have no contractual, employment, or financial interest in the institution. If the institution is governed by a hierarchical structure of multiple boards, the roles, responsibilities, and authority of each board—as they relate to the institution— are clearly defined, widely communicated, and broadly understood.**

Since 2013, public higher education in the State of Oregon has been fundamentally reorganized. Relevant to governance, the Oregon University System (of which SOU was a part) and the State Board of Higher Education both ceased operations, and independent governing boards for the seven public universities in Oregon were created. Signed into law by then-

Governor John Kitzhaber, [Oregon Senate Bill 270](#) established independent governing boards. The Board of Trustees of Southern Oregon University is now responsible for University governance. Although this change represents a shift in control and governance, it does not cause any change to the University's mission. The Board of Trustees of Southern Oregon University ("SOU Board") commenced its authority on July 1, 2015, and has established committees, bylaws, policies, and meeting dates to conduct its work.

Southern Oregon University now has considerable control with respect to its governance, internal authority, and the roles and responsibilities of its faculty, staff, and administration. The locally operating SOU Board of Trustees is empowered to make decisions for the Institution, rather than having those decisions made by a centralized Oregon University System as occurred in the past. The roles, responsibilities, and authority of the institutional governing board are clearly defined and widely communicated in the authorizing legislation, SB270; state statutes; and the board's bylaws.

By statute, the full board holds public meetings at least quarterly and more often when necessary. Board committees meet monthly and more often when necessary. The board's administrative officer manages preparation for all board meetings, serves as the information source on board matters, supports board members, and serves as recorder and repository of the board's official documents and records.

## Membership

The membership of the Board of Trustees of Southern Oregon University is established by law. With the exception of the University president, trustees are appointed by the Oregon governor and are subject to confirmation by the Oregon Senate in the manner prescribed by law. The Board of Trustees shall consist of 11 to 15 members. These at-large members have no contractual, employment, or financial interest in the Institution. The SOU president is an ex officio, nonvoting member of the University's 15-member governing board. In accordance with the authorizing legislation regarding the establishment and independence of governing boards, the governing board must also include a student enrolled at the University, a member of the SOU faculty, and a member of the Institution's non-faculty staff. While these may be appointed as voting or nonvoting members, these three are voting members on SOU's Board of Trustees. Excluding these four aforementioned positions, an additional 11 at-large community members serve as voting members of the board.

Also per authorizing legislation, trustees are appointed to four-year terms, with the exception of the faculty, staff, and student trustees, who are appointed to two-year terms. Trustees are limited to two full consecutive terms on the board, as prescribed by law.

To ensure the roles and responsibilities of the governing board are clearly defined, widely communicated, and broadly understood, the governing board itself received initial onboarding training from the professional organization Association of University Governing Boards as well as executive members of the University's staff. Ongoing training and information about the

roles and responsibilities of the governing board are shared by means of weekly communications; applicable governance and policy reviews in public meetings of the board or its committees; University meetings; and other occasions as appropriate. To ensure the roles and responsibilities of the board are clearly defined, widely communicated, and broadly understood among the campus community and general public, all meetings of the board and its committees are held in compliance with the state's public meetings laws. In addition, the Office of the Board of Trustees maintains a website where the authorizing legislation and bylaws of the board—both outlining board roles and responsibilities—are available to the public.

## Exhibits

- [Oregon Senate Bill 270](#)
- [Oregon Revised Statute ORS 352.076](#)
- [SOU Board of Trustees Bylaws](#)
- [Board Website](#)

**2.A.5 The board acts only as a committee of the whole; no member or subcommittee of the board acts on behalf of the board except by formal delegation of authority by the governing board as a whole.**

Senate Bill 270 fundamentally reorganized the higher education system in Oregon by establishing independent governing boards for the seven public universities in Oregon. In this authorizing legislation, the Board of Trustees of Southern Oregon University was created. Board actions and provisions regarding delegation of responsibilities also are well-defined. Additionally, the SOU Board of Trustees has codified policies that outline the responsibilities of members; establish board committees, board officers, and a Code of Ethics and Conflict of Interest statement; and determine conduct at board meetings to ensure the governing board—and its individual and collective membership—act as a whole. Notwithstanding the appointment of a chair, vice chair, and other officers, authority is vested in the board collectively and not in any individual trustee.

The board adopted a Statement on Board Committees, which identifies the roles and responsibilities of standing board committees. Board committees include the Executive & Audit Committee, Academic & Student Affairs Committee, and Finance & Administration Committee. Committees generally refer matters to the full board as seconded motions. The Executive & Audit Committee shall represent and, except as prohibited by applicable law, may act for the board on any matter (except for the hiring or removal of the University president). This committee generally endeavors to refer matters to the board, but it is expected the committee will act for the board when the committee determines it to be necessary or appropriate. The full board remains abreast of all agenda items undertaken by any committee of the board in the following ways:

1. All meetings of the board and its committees are conducted in accordance with open meeting and public records laws;

2. in accordance with the Board Statement on Board Committees, the board secretary transmits required notices of meetings of standing committees of the board to be sent to each member of the board; and

3. the committee reports on its proceedings at each regular meeting of the full governing board.

The Southern Oregon University Board of Trustees maintains a Board Statement Delegation of Authority, which provides for the authority of the board, authority of the president, and enforcement of board and presidential actions. The board and its committees adhere to these policies strictly to ensure the board acts as a whole and no member or subcommittee of the board acts on behalf of the board except in cases of formal delegation of authority.

## Exhibits

- [Senate Bill 270](#)
- [Board Statement on Board Committees](#)
- [Board Statement on Delegation of Authority](#)

**2.A.6 The board establishes, reviews regularly, revises as necessary, and exercises broad oversight of institutional policies, including those regarding its own organization and operation.**

Consistent with the Board of Trustees' authority to manage the affairs of SOU and in recognition of its fiduciary obligations, the board retains authority over the development and implementation of statements of authority applicable to the University's affairs, including bylaws, committee charters, board statements, board resolutions, University policies, University procedures, handbooks, and manuals.

In the Board Statement on Policies, the board established an SOU Policy Council, which is charged with assisting with the formulation, drafting, revision, recommendation, and maintenance of the board's and University's statements of authority. The SOU Policy Council is convened by the SOU general counsel. The Policy Council comprises representatives of the major functional units at the University (e.g., Human Resource Services, Business Affairs, Contracting & Procurement, Campus Public Safety, Academic & Student Affairs, Risk Management) as well as duly elected or appointed representatives of the Faculty Senate or ASSOU. The council is a consultative, multifunctional group designed to provide valuable input and advice on the categories of authority described in the Board Statement on Policies. The Policy Council met on six occasions during the 2015–16 academic year.

This committee is used to uphold processes for creating and sustaining consistent, clear, and current University policies in a standardized format that comply with laws, governing polices,

and administrative rules. This includes receiving proposed policies and policy revisions from various programs and campus constituencies as well as ensuring relevant campus committees and constituencies have an opportunity to comment on and contribute to the development of policies. After vetting from appropriate campus groups and upon authorization from the president, new policies and policy revisions are posted on the University's website prior to final approval by the SOU president. All adopted policies are posted on SOU's website at a central repository for all University policies.

Under the new governance model effective July 1, 2015, the Oregon Administrative Rules adopted by the State Board of Higher Education were transferred as policies to Southern Oregon University by operation of law on July 1, 2015. This has since been revised and, after being posted for community comment, incorporated into the SOU central policy repository.

On June 26, 2015, the SOU general counsel presented Board of Trustees with a plan for policy revision and oversight, with particular emphasis on a plan to incorporate and review the policies transferred from the State Board of Higher Education into the SOU policy library and to initiate a process for assessment and review of all University policies. The general counsel is scheduled to provide the board with an update on revision of the transferred polices and efforts to initiate periodic review of all University policies at its next regularly scheduled board meeting on October 21, 2016.

## Exhibits

- [Board Statement on Policies](#)

**2.A.7 The board selects and evaluates regularly a chief executive officer who is accountable for the operation of the institution. It delegates authority and responsibility to the CEO to implement and administer board-approved policies related to the operation of the institution.**

As provided in ORS 352.096, in consultation with the governor or the governor's designee, the board shall appoint and employ a president of the University. Except in the case of an interim or acting president, the hiring committee for the president of the University shall include representatives of the University community and at least one other president of a public university based in Oregon. Bylaws and policies further prescribe the selection and evaluation of a president who is accountable for the operation of the Institution. This selection process is guided by the following:

- ORS 352.096, which prescribes the process for appointment of a university president, roles of the president, and hiring of university personnel.
- OSBHE "Policy on Executive Searches, Appointments, and Management," which transferred to SOU on July 1, 2015.

- SOU Board of Trustees Statement on Delegation of Authority, which outlines the board's role in appointment of the University president.

Adhering to these policies, the SOU Board of Trustees embarked on a presidential search in 2016 and selected Dr. Linda Schott as president of Southern Oregon University. Dr. Schott was appointed on June 6, 2016. The board has not yet had the opportunity to evaluate this president, whose term began July 26, 2016.

The immediate past president of the Institution was hired by the Oregon University System on a two-year contract as an interim president. The president's evaluation was conducted by the Oregon State Board of Higher Education in 2015 and reviewed by the SOU governing board on commencement of its operation in July 2015. That president retired in 2016. The governing board currently is developing a policy by which the University's chief executive officer/president, who is accountable for the operation of the Institution, will be evaluated.

## Delegates Authority and Responsibility

The Southern Oregon University Board of Trustees maintains a Board Statement on Delegation of Authority, which provides for the authority of the board, authority of the president, and enforcement of board and presidential actions. The board and its committees adhere to these policies strictly to ensure the board acts as a whole and no member or subcommittee of the board acts on behalf of the board except in cases of formal delegation of authority.

The SOU president is the executive and governing officer of the University, except as otherwise provided by statute or board actions. Subject to the supervision of the board and board action, the president shall direct the affairs of the University. The authorities and responsibilities of the president are defined in SOU's Board Statement of Delegation of Authority. The president may delegate any of these authorities and responsibilities, except as provided by board actions. Any delegation must be consistent with board actions. The president remains responsible for proper functioning of the University, notwithstanding any delegation.

## Exhibits

- [Board Statement on Delegation of Authority](#)
- [Oregon Revised Statute ORS 352.096](#)
- [OSBHE "Policy on Executive Searches, Appointments and Management"](#)

2.A.8 **The board regularly evaluates its performance to ensure its duties and responsibilities are fulfilled in an effective and efficient manner.**

The SOU Board of Trustees acts in accordance with its charge outlined in SB 270 establishing the creation of Oregon public university governing boards. Additionally, the board adheres to a set of bylaws that govern the board's authority, including those related to organizing the

board and detailing responsibilities of board members and its committees. Policies, bylaws, and administrative rules are adopted by the board at public meetings in accordance with the Oregon public meeting law.

Via legislative mandate, the Oregon Higher Education Coordinating Commission evaluates the University and board on a biannual basis to ensure its duties and responsibilities, especially those that are statutorily mandated, are fulfilled. The first of these evaluations is scheduled for December 2016.

In summer 2016, the Board began planning a self-assessment at the conclusion of its first year of operation. Through a two-step process culminating in a facilitated discussion in fall 2016, the board will review and, where necessary, revise its practices to ensure its duties and responsibilities are fulfilled in an effective and efficient manner.

## Exhibits

- [Oregon Revised Statute, ORS: 352-061](#)

2.A.9 **The institution has an effective system of leadership, staffed by qualified administrators, with appropriate levels of responsibility and accountability, who are charged with planning, organizing, and managing the institution and assessing its achievements and effectiveness.**

The president is assisted by an Executive Cabinet of three vice presidents—the provost and vice president for academic and student affairs; vice president for finance and administration; and vice president for development and executive director of the SOU Foundation. The director of government relations; director of diversity and inclusion; and SOU's general counsel also serve on the President's Executive Cabinet. All members of the cabinet are appropriately qualified for their respective positions.

## Exhibits

- [Exhibit 2.A.9 President Linda Schott CV 2016]
- [Exhibit 2.A.9 Prov and VP for Acad and Student Affr S Walsh CV 2016]
- [Exhibit 2.A.9 VP Fin and Admin Craig Morris CV 2016]
- [Exhibit 2.A.9 VP Development Janet Fratella CV 2016]
- [Exhibit 2.A.9 Assoc Prov J Waters CV 2016]
- [Exhibit 2.A.9 AVP Acad Rsrc Mgmt K Stone CV 2016]
- [Exhibit 2.A.9 AVP Budget and Planning Mark Denney CV 2016]

The President's Cabinet serves in an advisory function and provides input to the president on operational, policy, and other institutional matters from its members as well as other groups, including the University Planning Board, Faculty Senate, and Associated Students of Southern

Oregon University. Recommendations from other management staff and groups are also presented and discussed at Executive Cabinet.

The president also convenes an Executive Council, which includes the associate provost; associate vice presidents; academic division directors; chief information officer; director of marketing; director of media relations; director of athletics; University librarian; director of human resources; director of housing and food services; and executive director of Jefferson Public Radio (JPR). This team works closely with the president and President's Cabinet on developing, implementing, and managing the University's strategic plan and initiatives.

Leadership of the seven academic divisions is provided by division directors who are charged with the development and implementation of each division's mission within the scope of the larger University mission and for the effective operation of the unit. These leaders are directly responsible for:

a. administering matters relating to personnel, budget, curriculum, and scheduling;
b. consulting with the division faculty and/or advisory council in establishing and maintaining effective division practices to accomplish its administrative responsibilities; and
c. acting as a liaison between their division as well as other academic divisions and the senior administration.

The University librarian serves as the director of Hannon Library and its faculty.

### 2.A.10 The institution employs an appropriately qualified chief executive officer with full-time responsibility to the institution. The chief executive officer may serve as an ex officio member of the governing board but may not serve as its chair.

Dr. Roy Saigo concluded his two-year appointment as president of SOU in July 2016. He was appointed as interim president by the State Board of Higher Education in 2014 following the departure of Dr. Mary Cullinan, who served as SOU president from 2006 to 2014. In September 2015, the SOU Board of Trustees voted to remove "Interim" from Dr. Saigo's appointment and contracted him to serve as University president until July 2016, pending completion of a presidential search started in March 2016. Dr. Saigo was appropriately qualified and committed full-time to the Institution.

In 2016, the board contracted with [Parker Executive Search](#) for recruitment of SOU's next president. The Search Committee comprised trustees (five), faculty (three), students (two), staff (two), another Oregon university president (one), and community members (two). Six ex officio, nonvoting members also served on the committee in coordinating or advisory roles. Several listening sessions were held to offer University and community members the opportunity to identify priorities and desired attributes for SOU's next president. A half-day retreat of the President's Executive Cabinet, SOU trustees, and representatives from Parker

Executive Search was held early in the process to consider composition of the search committee, timeline, and other aspects of the search process.

On June 14, 2016, the SOU Board of Trustees announced the appointment of Dr. Linda Schott as SOU's next president. Dr. Schott previously served as president of University of Maine at Presque Isle. She holds a doctorate in history and humanities from Stanford University, a master's degree in history and German (also from Stanford), and a bachelor's degree in history from Baylor University. Prior to her current role as president, Schott held various positions in higher education teaching and administration, including dean of the School of Arts, Humanities, & Social Sciences at Fort Lewis College; associate dean for the College of Arts & Sciences at Eastern Michigan University, Ypsilanti; and numerous faculty appointments.

In accordance with the SOU Board of Trustees' Statement on Delegation of Authority, the president governs and directs operations of the University subject to direction of the board. The president is an ex officio member of the governing board and does not serve as chair.

**2.A.11 The institution employs a sufficient number of qualified administrators who provide effective leadership and management for the institution's major support and operational functions and work collaboratively across institutional functions and units to foster fulfillment of the institution's mission and accomplishment of its core theme objectives.**

The following administrators report directly to the president:

- provost and vice president for academic and student affairs; vice president for finance and administration; and vice president for development and executive director of the SOU Foundation
- director of marketing and communications (including public information officer)
- director of athletics
- director of diversity and inclusion
- board secretary
- SOU general counsel
- director of governmental relations and chief of staff
- director of Jefferson Public Radio

Each administrator is appropriately prepared and credentialed. Each vice president heads one of the three major divisions of the University (Academic & Student Affairs, Finance & Administration, and Development).

## Exhibits

- [Exhibit 2.A.11 SOU-Org-Chart]

Each division is outlined below.

Under the provost and vice president for academic and student affairs are seven academic divisions, each headed by a director who reports directly to the provost:

- Oregon Center for the Arts at SOU
- Division of Business, Communication, & the Environment
- Division of Social Sciences
- Division of Health, Education, & Leadership
- Division of Humanities & Culture
- Division of Science, Technology, Engineering, & Mathematics (STEM)
- Division of Undergraduate Studies

Twenty-three program chairs and three program coordinators assist the academic division directors.

The following administrators report to the provost and vice president for academic and student affairs:

- University librarian for Hannon Library and the Learning Commons
- director of institutional research
- director of international programs
- director of grants and contracts
- associate vice president for enrollment and retention
- associate vice president for academic resource management
- associate provost and director of graduate studies
- director of housing and food service
- registrar and director of enrollment and retention assessment
- director of admissions
- executive director of outreach and engagement
- director of grants and contracts
- director of the Honors College

The following report to the associate provost and director of graduate studies:

- director of student life
- director of the Student Health & Wellness Center (SHWC)
- director of the Office of Student Support & Intervention (OSSI)
- director of the Center for Instructional Support (CIS)
- director of university assessment

- Digital Media Center and Rogue Valley Community Television
- program director of the Ronald E. McNair Post-Baccalaureate Achievement Program

The associate provost also serves as the administrative contact for undergraduate and graduate Curriculum, Faculty Development, University Assessment & Accreditation, and Academic Policies & Standards.

The associate vice president for academic resource management reports directly to the provost and works with academic division directors and chairs to align curriculum with the University's mission. The AVP for ARM monitors enrollment trends and projections; sets enrollment targets in cooperation with directors and program chairs; monitors course scheduling and cancellation; and oversees faculty teaching load, including the allocation of faculty course release time and related payroll/contract issues.

The following report directly to the vice president for finance and administration:

- associate vice president for budget and planning
- director for facilities management and planning
- director of the service center
- director of campus public safety
- director of business services
- director of human resources
- director of information technology and chief information officer

The vice president for finance and administration also oversees risk management, contracting, and budget.

Under the vice president for development are:

- director of finance and administration (development)
- director of alumni relations
- major gifts officer

The vice president for development is also the executive director of the SOU Foundation, a separate 501c(3) governed by its own Board of Trustees.

The management team is appropriately sized to the Institution and works collaboratively to achieve the mission and core themes and objectives. To assist with this effort, several administrative councils operate to organize the work of the University as follows:

Business Affairs Council is chaired by the vice president for finance and administration and includes all six Finance & Administration directors as well as the bursar and director of institutional research. The council reviews and advises on issues regarding policy, business processes, governance, strategic planning, and goal setting.

Directors Council is chaired by the provost and includes the vice president for finance and administration; associate provost; associate vice president for academic resource management; associate vice president for enrollment and retention; seven academic division directors; associate vice president for budget; director of institutional research; Faculty Senate chair; director of student life; director of admissions; and University registrar and director of enrollment and retention assessment. The council reviews and makes decisions and recommendations regarding all matters relating to enrollment, retention, and policies and procedures associated with academic and student affairs.

Executive Council comprises the associate provost; associate vice presidents; academic division directors; chief information officer; director of marketing; director of media relations; director of athletics; University librarian; director of human resources; director of housing and food services; and executive director of Jefferson Public Radio. This team works closely with the president and President's Cabinet on developing, implementing, and managing the University's strategic plan and initiatives.

The SOU Foundation Board of Trustees is composed of business and community leaders, alumni, and others dedicated to the advancement of Southern Oregon University. It has two primary roles: 1) to support the development function of the University by encouraging philanthropic contributions and 2) to provide oversight of the SOU Foundation, the nonprofit 501(c)(3) organization that manages donor funds. Membership ranges from 20 to 40 members, who are elected by the board and serve three-year terms. The SOU Foundation also has several legally defined affiliates, whose primary purpose is to raise philanthropic support for specific SOU-related programs; the SOU Foundation serves as the fiduciary sponsor of these organizations. These affiliates include Osher Lifelong Learning Institute (OLLI), Raider Club (Athletics), Chamber Music Concerts (CMC), Friends of Hannon Library, Friends of the Schneider Museum of Art (SMA), and SOU Alumni Association. Each affiliate has one representative who is elected annually by its membership to serve on the SOU Foundation Board of Trustees. The SOU president and vice president of development/executive director of the SOU Foundation serve as ex officio members of the Board of Trustees.

Provost's Advisory Council (PAC) was established in 2013 with the integration of Academic Affairs and Student Affairs. The council is chaired by the provost and consists of the associate provost, vice presidents, and all directors within Academic & Student Affairs. The mission of the PAC is to create "a collaborative community to share information, review policies, set strategic direction and goals, and solve problems in innovative ways. We encourage professional development and the sharing of professional knowledge with our colleagues." PAC meets once each academic quarter.

## Policies and Procedures

### Academics

2.A.12 **Academic policies, including those related to teaching, service, scholarship, research, and artistic creation are clearly communicated to students, faculty, and administrators and staff with responsibilities related to these areas.**

These policies are posted on the official [SOU Policies website](SOU Policies website).

In addition, the University's credit hour policy is located on p. 2 of the [University Catalog](University Catalog): 1 unit of credit represents approximately three hours of time each week for one term. This time may comprise work in the classroom, the laboratory, or outside.

Generally, faculty members are entrusted with broad individual academic freedom to pursue and teach the content within their courses and discipline and are free to discuss a variety of ideas in the context of learning and scholarship. Academic freedom is protected for all SOU faculty under SOU policy 580-022-0005, which states, "All teachers in Department institutions are entitled to freedom in the classroom in discussing subjects." Section 2 also reads, "[A]s a matter of policy the Board neither attempts to control, sway nor limit the personal opinion or expression of that opinion of any person on the faculty or otherwise on the Department payroll." [[Exhibit 2.A.28 AAD 044 Academic Freedom](Exhibit 2.A.28 AAD 044 Academic Freedom)] Faculty members are aware the concept of academic freedom is accompanied by the equally demanding concept of academic responsibility and maintaining appropriate standards of scholarship and instruction.

Academic freedom is further promoted in Article 1, Sections C and E of the Associated Professors of SOU Collective Bargaining Agreement. [[Exhibit 2.A.1 Faculty Collective Bargaining Agreement](Exhibit 2.A.1 Faculty Collective Bargaining Agreement)] Section C of the CBA declares, "The teacher is entitled to freedom in the classroom in discussing the subject of their courses, courses or contemporaneous topics that may impact the subject or methods of their courses, as well they are entitled to the selection of course materials, and to promote activities that encourage the broadening of student inquiry and investigation into areas and topics related to their courses. Faculty have the concurrent responsibility to refrain from introducing topics or materials that are in no sense, broad or narrow, germane to their course objectives, disciplinary methods, or course content." Section E states, "When speaking or writing as a citizen, the [faculty] member should be free from institutional censorship or discipline."

The University policy on academic freedom and AP:SOU CBA are posted on the official SOU Policies web page and are easy to find at the Full Policy Listing and Collective Bargaining Agreement tabs of the website. The policies website is the central repository for all policies governing SOU's rules and operations and has been in existence since fall 2010.

Information about institutional policies and procedures is disseminated in a variety of ways. Format (e.g., electronic, print, live presentation) and frequency of delivery are determined

based on the target audience, schedules for systematic updates or reminders, and relative importance of the information to the areas addressed. For example, disciplinary expectations for faculty scholarship are included in the SOU Faculty Senate Bylaws (Section 5), which are accessible electronically and in print. Expectations for faculty scholarship specific to each program/discipline and developed by each academic program are available on the provost's website.

Currently, intellectual property rights of faculty members are governed by intellectual property rights policy. [Exhibit 2.A.12 FAD.056 Intellectual Property] Because SOU is expanding its online offerings, the University has developed a memorandum of understanding for use for online course developers at the Institution. Among other issues, it attributes intellectual property rights to the University for materials associated with online courses.

Policies and procedures related to research conducted using external funding recognize the value of these sponsored programs. Through external support, faculty are able to conduct research and develop programs that improve the quality of education for students; provide information and services that benefit our community and state; and contribute to the body of knowledge that can be used for the benefit of humanity. Sponsored research and programs are coordinated through the Office of Grants and Sponsored Projects Administration (GA), which is located in Academic & Student Affairs, thus emphasizing the role played by extramural funding in supporting the Institution's teaching, research, and service functions. Providing pre and post-award services, the office identifies and disseminates information on grant opportunities, assists in proposal development, manages proposal submission, and provides oversight for regulatory compliance.

SOU policies and procedures relating to grants and sponsored programs are available in several formats. They are described at the Grants and Sponsored Programs website and electronic version of the Project Directors Handbook. Supplemental templates, supporting documents, and internal routing forms are also available online. Faculty also find numerous resources available at the Grants website and in print format to guide them through the Institutional Review Board process and obtaining external funding.

2.A.13 **Policies regarding access to and use of library and information resources— regardless of format, location, and delivery method—are documented, published, and enforced.**

Hannon Library maintains a manual of policies and procedures that deal with library loans and borrowing privileges, services, acceptable use, patron conduct, library staff and faculty, and all aspects of collections use and development. The Collection Development Policy clearly articulates the principles, policies, and guidelines governing the selection, acquisition, processing, organization, preservation, and eventual weeding of materials or information resources in all formats in the University Library's collections. The policy promotes consistency among those who have responsibility for developing the collections and helps communicate

the library's collecting policies and goals to faculty, staff, students, and other members of the University community.

Pursuant to Faculty Senate Bylaw 1.233, the Faculty Senate Library Committee (composed of six program faculty members) meets at least once per quarter with the director of the library or a designated representative to review and propose policies and practices regarding library operations and materials.

Hannon Library policies and procedures are regularly updated. Library policies can be accessed on the University policy page, [Exhibit 2.A.13 Library Ref Material Policy] and [Exhibit 2.A.13 Library Collection Development Policy]. Procedures are maintained within the library. Policies are enforced by library staff.

2.A.14 **The institution develops, publishes widely, and follows an effective and clearly stated transfer-of-credit policy that maintains the integrity of its programs while facilitating efficient mobility of students between institutions in completing their educational programs.**

Southern Oregon University regularly maintains its transfer articulation website, which includes faculty-negotiated articulation agreements between partner institutions as well as several course-by-course articulations. SOU's primary feeder institutions and each four-year school are fully articulated and updated each year. Courses for other institutions are added as they appear on a student's transcript. While the transfer site is our main resource, general policies/practices related to the transfer of courses are also discussed in the SOU Catalog each year under the Admission of Transfer Students section. Decisions regarding applicability of specific transfer courses are ultimately vested in appropriate SOU faculty, who have subject-area curricular expertise. The Office of the University Registrar carefully follows all applicable best practices regarding transfer of credit and seeks regular training and guidance from organizations such as the American Association of College Registrars and Admissions Officers (AACRAO).

## Students

2.A.15 **Policies and procedures regarding students' rights and responsibilities—including academic honesty, appeals, grievances, and accommodations for persons with disabilities—are clearly stated, readily available, and administered in a fair and consistent manner.**

The Southern Oregon University student affairs policy can be found on the University's policies website and on the Office of Student Support and Intervention (OSSI) website. The OSSI website links to SOU policies and procedures related to academic honesty, student conduct and appeals, equity, and nondiscrimination. In addition, the website provides additional information regarding SOU support programs, state and federal resources, and external

information regarding students' rights related to Title IX and gender equity. The Student Rights and Responsibilities, Code of Conduct, and Academic Standards/Grading Grievance Policy of our institution can be found on the OSSI website and the University's policies website. The Academic Standards/Grading Grievance Policy is also located on the Provost's Office web page.

The Disability Resources Office has created a website to house its Disability Resources Student Handbook as well as information about the rights and responsibilities of persons with disabilities. To ensure our accommodations are administered in a fair and consistent manner, our institution complies with the professional ethical standards outlined by the Association of the Higher Education and Disabilities (AHEAD), with specifics contained within the Student Code of Conduct [Exhibit 2.A.15 (573-076) Code of Student Conduct] Policy on Student Records, which articulates expectations around student records, access, directory information, and grades related to student records. [Exhibit 2.A.15 SAD 016 (573-075) Student Records]

2.A.16 **The institution adopts and adheres to admission and placement policies that guide the enrollment of students in courses and programs through an evaluation of prerequisite knowledge, skills, and abilities to ensure a reasonable probability of student success at a level commensurate with the Institution's expectations. Its policy regarding continuation in and termination from its educational programs—including its appeals process and readmission policy—are clearly defined, widely published, and administered in a fair and timely manner.**

SOU carries out a holistic review of student record prior to admission, which includes assessment of minimum GPA, SAT, and/or ACT scores, and individual subject area requirements. "Holistic" review means both academic performance and personal attributes are assessed and used to determine a student's overall potential for success, which may mean a lower score and/or GPA may be offset by stronger personal or other attributes. Admissions policies are found on the Admissions website and include policies and procedures for evaluating credit earned through Advanced Placement (AP), International Baccalaureate (IB), and College Level Examination Program (CLEP). Admissions based on GED and Homeschool completion are also available on the Admissions website.

All students entering the University need to demonstrate proficiency in a second language by having completed two years of high school instruction. Students who fail to meet this requirement must complete two terms at the college level with a minimum of C- for each term. Students who wish to take language instruction at a level higher than the introductory (101) level are required to take a language placement test. In addition, following students' admission to the University, their SAT and ACT results are used to determine appropriate math placement. All students are required to complete at least one college-level mathematics class to complete their degree. In addition, students who seek a bachelor of arts need to have completed four years of foreign language instruction in high school or two years at the college level. Students who seek a bachelor of science must complete an additional math, designated

programming, logic, or statistics course, designated by the level of proficiency demonstrated in their placement exam. In this way, the University ensures students enroll in the courses best-suited to their level of proficiency while maintaining institutional standards. Requirements for language and mathematics proficiency prior to admission are available at the Admissions website and during first-year advising and orientation.

All incoming students, both first-year and transfer, receive advising from an academic advisor and/or faculty advisor prior to their first term to ensure they enroll in appropriate classes for their degree aspirations and academic level. This advising begins with new student orientation and advising events known as ROAR (Raider Orientation and Registration), one-and-a-half-day events offered to first-year students, including their families, in the summer before entry. ROAR includes advising, registration, and orientation to a wide range of University programs and services, including Student Support & Intervention, Financial Aid, Student Life, TRiO programs, tutoring services, residential and dining facilities, campus resource centers, student clubs, and majors and degree programs. Each student leaves the event having registered for fall term classes and with a designated advisor as each first-year University Seminar class includes advising with USEM faculty. Some students will also be assigned a major advisor, depending on whether they have chosen a major or degree program.

Programs identify requirements, restrictions, prerequisites, and minimum GPA expectations to enable students to move forward in their chosen degree. Students who fail to maintain a required GPA may need to repeat courses for a higher grade or may be prevented from declaring their major. In addition, students may not register for a course without having completed prerequisites, often with a minimum grade, although individual instructors and programs may waive prerequisites if sufficient evidence exists that the student can achieve success.

Policies regarding student academic progress, standards, academic suspension, appeals processes, and readmission are clearly outlined in the Catalog and specifically on the page for Academic Policies. Individual programs with expectations for academic standing articulate these as program policies and are published in the Catalog as well as in advising materials and syllabi produced by individual programs for distribution to students.

**2.A.17 The institution maintains and publishes policies that clearly state its relationship to cocurricular activities and the roles and responsibilities of students and the institution for those activities, including student publications and other student media, if offered.**

SOU supports cocurricular activities on campus. Student Life administers a significant portion of cocurricular activities on campus, including clubs and organizations in the following categories: academic, arts and culture, civic engagement, sustainability and/or volunteer service, religious, cultural/international, professional/career, recreation, outdoor pursuits, club sports, residence halls, social and political engagement, student government, traditions, multicultural coalitions, and identity-based resource centers. Policies and procedures are

available for all students at SOU's [Student Life web pages.](#) SOUConnect, a software product provided by Campus Labs, is Student Life's online portal, and it is used to track student engagement and involvement opportunities. It allows students to find information about events and activities on campus, track their participation, and use the system's competency-based monitoring of engagement by completing assessments that capture the value of experiences outside the classroom. The system tracks participation, and generates automated cocurricular transcripts to document their involvement.

Policies and procedures pertaining to cocurricular opportunities are reviewed and updated as needed. These include student travel procedures; requests for contracts for services; funding requests and reimbursements; risk management and event planning; student elections and committee appointments; and bylaws governing student government. All registered student-run organizations advised through Student Life are required to attend trainings and committee meetings as well as registering both their organization and travel and event activities on SOUConnect.

## Human Resources

2.A.18 **The institution maintains and publishes its human resources policies and procedures and regularly reviews them to ensure they are consistent, fair, and equitably applied to its employees and students.**

Institutional policies and procedures—along with University System policies and State Rules and regulations—are clearly posted on the University's policies website. The [Human Resource Services policy page](#) also contains this information. Also found there are links to the collective bargaining agreements for classified staff (SEIU Local 503) and faculty (Association of Professors, Southern Oregon University) which set forth many of the conditions of employment for those groups of employees.

The University Policy Review Committee carries the responsibility for approving new policies and reviewing existing policies. The committee is made up of six staff members from across campus as assigned by the University president. They are charged with reviewing existing policies every three years or when existing state or federal law or regulatory changes necessitate an earlier review. University policies include a date stamp indicating the date when the Policy Review Committee's last review took place. The process employed by the Policy Review Committee is outlined on the University website.

The director of human resources is charged with ensuring policies and procedures are adhered to and is responsible for administering the grievance procedure available for administrative staff [[Exhibit 2.A.18 FAD 008 Grievance Proc for Admins](#)] when they believe they have been adversely affected in connection with a personnel action in the application of a University policy, rule, or procedure under which the University operates. Grievance procedures for

classified staff and faculty are laid out in their respective collective bargaining agreements and Academic Faculty Bylaws.

Supervisors are encouraged to work with Human Resource Services personnel, and frequently do, as they apply policies and procedures in the workplace.

**2.A.19 Employees are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluation, retention, promotion, and termination.**

Employees of the University are hired under clearly advertised position descriptions that outline the responsibilities and essential functions of their positions. Newly hired employees are also provided with a copy of that position description, which they review with their supervisor. The certified position description is placed in the employee's official personnel file. If the description is updated, the process is repeated and a newly certified copy is placed in the personnel file.

Administrative staff employees are referred to the University Policies and Procedures in initial offer letters and employment contracts for conditions of their employment. The initial probationary period for administrative staff is laid out in the employment contract signed by the employee. Classified staff and faculty are referred to their respective collective bargaining agreements for conditions of employment.

Administrative staff are evaluated in accordance with the procedures set forth in policy (Administrators Performance Management FAD.012). Administrative staff are expected to be evaluated formally at least once per year with provisions that ongoing dialogue occurs between employees and supervisors on performance and expectations. Conditions determining retention, advancement, discipline, and termination are outlined in the collective bargaining agreements for SEIU and AP:SOU as well as in the faculty bylaws.

**2.A.20 The institution ensures the security and appropriate confidentiality of human resources records.**

According to University Policy [Exhibit 2.A.20 FAD 002 Personnel Files], Human Resource Services maintains and secures official employee personnel files. This policy dictates which documents are to be placed in files as well as who may access the files. In recent renovations to Human Resource Services, a secure file storage room with locked storage cabinets was added to house personnel records. Files containing employee benefits/medical information are stored in a separate secure location apart from regular personnel files. Access to files is limited in accordance with state and federal law and guidelines and monitored by Human Resource Services.

Southern Oregon University is committed to operating with integrity in every endeavor. For the SOU community, institutional integrity is defined as:

1.  meeting a high standard of employee and institutional accountability;
2.  honesty;
3.  ethical behavior;
4.  fair treatment for all;
5.  respect for each member of the University community; and
6.  consistent action based on clear expectations.

Integrity includes a commitment to the protection of academic freedom, accuracy, honesty in programmatic claims, and active efforts to promote diversity.

## Institutional Integrity

2.A.21 **The institution represents itself clearly, accurately, and consistently throughout its announcements, statements, and publications. It communicates its academic intentions, programs, and services to students and to the public and demonstrates that its academic programs can be completed in a timely fashion. It regularly reviews its publications to ensure integrity in all representations about its mission, programs, and services.**

Southern Oregon University—including its governing board members and employees—subscribes to, exemplifies, and advocates high ethical standards in management practices and business operations in all of its dealings with students, the public, organizations, and external agencies. SOU regularly evaluates and revises as necessary its policies, procedures, and publications to ensure continuing integrity throughout the Institution.

In the context of publications, institutional integrity is defined as University information that is honest, accurate, complete, consistent, timely, usable, and appropriate for the intended audience. Good University information is essential in striving for teaching and learning excellence, professional and organizational excellence, and institutional accountability, which are key components of the mission and goals of Southern Oregon University. Official communications follow the University's guidelines on communications as posted at the University's policies website. [Exhibit 2.A.21 Communications Guidelines Policy]

The director of marketing is responsible for ensuring the integrity of external marketing documents and oversees outbound-facing electronic and print communications. Marketing and external messages are guided by several documents found on the Marketing & Communications Office website.

The SOU Brand Standards, Logos, and Sub-Logo Usage Guide identifies the elements of SOU's brand identity system as well as the rules for the use of graphics, including the logotype, official seal of the University, spirit mark, and mascot. [Exhibit 2.A.21 SOU Brand Standards Logos and Sub-Logo Usage Guide]

The SOU Writing Style Guide addresses common issues that arise in writing for print publication at SOU. It covers usages specific to the University as well as being a general guide. [Exhibit 2.A.21 SOU Writing Style Guide]

The SOU Social Media Guidelines help clarify how best to enhance and protect personal and professional reputations when using social media. [Exhibit 2.A.21 SOU Social Media Guidelines]

The SOU Blog Guidelines cover the content of official University blogs as well as the responsibilities that would be assumed by anyone who chooses to create a blog in the name of the University. [Exhibit 2.A.21 SOU Blog Guidelines]

The SOU Media Relations Guidelines explain what a University employee should do if contacted by a news reporter. [Exhibit 2.A.21 SOU Media Relations Guidelines]

The SOU University Descriptions provide short and long versions of University boilerplate available to faculty, staff, and students for a variety of uses. They provide a consistent University description for use in print and online publications. [Exhibit 2.A.21 SOU University Descriptions]

The SOU Email Signature Standards provide a guideline for email signatures across campus. This creates consistency in electronic communication from all SOU employees. [Exhibit 2.A.21 SOU Email Signature Standards]

The Admissions Office and Registrar's Office maintain an academic-year course catalog that is replicated and updated on the University's website: catalog.sou.edu. This catalog provides students with a road map for their academic planning through graduation. In addition, an academic planner contains important advising and calendar dates to encourage early registration and other habits critical to retention. Student advising and admissions materials reflect the mission and vision of the University—in addition to maintaining consistent graphic standards. During the last five years, there has been a substantial increase in electronic communication, including email, University websites, and desktop publishing. The main SOU website was launched in 1995 and underwent a total overhaul in 2011. In an effort to better reflect the University's goals for recruitment and retention, another complete overhaul of the website is currently underway. The new website will mirror the graphic standards upheld in the overall University publications while providing students, faculty, and staff with a valuable tool for teaching and learning.

As part of the reconstruction of the new sou.edu website, the majority of the procedural (internal facing) information is being moved to the inside.sou.edu website, which will allow the main sou.edu website to be leaner and more focused on marketing the University to prospective students and other external users. SOU programs will migrate their existing sou.edu website content to the inside.sou.edu website.

As new sou.edu web pages are being built and procedural content is migrated to inside.sou.edu, there will be a time period during website construction where academic

program web resources normally found on the sou.edu website will be temporarily housed on inside.sou.edu. Migration of all academic sections to sou.edu will be completed by winter term 2016. Once completed, the new sou.edu academic pages will contain all of the individual academic program information needed for prospective students, while the inside.sou.edu academic pages will function as a place to house program information for current students, faculty, and staff.

E-marketing to prospective students is now conducted through the Admissions Office using social media and an email service. The Marketing Office oversees content development for the website and supervises signage and graphic standards issues. SOU refreshed its graphics in 2011 with a new logo, University seal, spirit mark, and mascot.

2.A.22 **The institution advocates, subscribes to, and exemplifies high ethical standards in managing and operating the institution, including its dealings with the public, the Commission, and external organizations, and in the fair and equitable treatment of students, faculty, administrators, staff, and other constituencies. It ensures complaints and grievances are addressed in a fair and timely manner.**

All public employees of SOU are covered by the State of Oregon's government ethics laws. SOU's Policies Web Repository website provides an index of policies, Internal Management Directives (IMDs), union contracts, and University and State of Oregon administrative rules related to ethical and lawful conduct by employees, including policies on sexual harassment and consensual relations. In addition, various other policies related to student and employee conduct are posted on the web pages of the relevant authority; for example, the Student Handbook and Information Technology Acceptable Use Policy are posted on the Student Affairs and Computing Services web pages respectively.

## Ethical Policies and Procedures

SOU is dedicated to fostering an environment that promotes ethical research practice and academic integrity. One area of ethical compliance is managed by Grants Administration in relation to human subject protection and animal care. Both the Institutional Review Board (IRB) and Institutional Animal Care & Use Committee (IACUC) are registered and in compliance with their cognizant federal agencies—the US Department of Health & Human Services and US Department of Agriculture. More information can be found on the SOU Grants website.

Grants Administration provides general information about policy and uses the proposal clearance and review process to identify projects subject to regulation.

The SOU Institutional Review Board and Institutional Animal Care & Use Committee are presidential committees mandated by federal guidelines and University accrediting bodies. Responsibility for oversight resides within the Provost's Office.

All University policies, procedures, and applicable forms pertaining to grievances, external operations and relations, and fair and equitable treatment of students, faculty, and staff are available on the SOU Policies website, Human Resource Services website or University Foundation website.

2.A.23 **The institution adheres to a clearly defined policy that prohibits conflict of interest on the part of members of the governing board, administration, faculty, and staff. Even when supported by or affiliated with social, political, corporate, or religious organizations, the institution has education as its primary purpose and operates as an academic institution with appropriate autonomy. If it requires its constituencies to conform to specific codes of conduct or seeks to instill specific beliefs or worldviews, it gives clear prior notice of such codes and/or policies in its publications.**

The University recognizes conflicts of interest raise serious ethical issues that could threaten its integrity. Members of the governing board as well as certain titled positions like the president, provost, vice presidents, and other senior officers are required to report annually through the Annual Verified Statement of Economic Interest governed by Oregon Revised Statute 244.050. University policies defining conflicts of interest in consensual relationships and outlining penalties are available to employees in the Policy and Procedure section of the SOU Policies website.

Officers and employees of SOU are required by law to comply with the Oregon Government Ethics Law (ORS Chapter 244). This law includes a specific provisions stating, "Except as provided in subsection (2) of this section, a public official may not use or attempt to use official position or office to obtain financial gain or avoidance of financial detriment for the public official, a relative or member of the household of the public official, or any business with which the public official or a relative or member of the household of the public official is associated, if the financial gain or avoidance of financial detriment would not otherwise be available but for the public official's holding of the official position or office." The statute defines "public official" to include SOU's trustee and employees.

Further, members of the governing board as well as certain statutorily specified positions— including the president, provost, and all vice presidents—are required to report to the Oregon Government Ethics Commission an Annual Verified Statement of Economic Interest governed by Oregon Revised Statute 244.050. The board has also adopted a specific policy applicable to board members regarding conflicts of interest. [Exhibit 2.A.23 Ethics and Conflicts of Interest]

 University policies defining conflicts of interest in consensual relationships and outlining penalties are available to employees on the SOU Policies website [Exhibit 2.A.23 Conflicts of Interest and Consensual Relationships].

2.A.24 **The institution maintains clearly defined policies with respect to ownership, copyright, control, compensation, and revenue derived from the creation and production of intellectual property.**

Southern Oregon University policy clearly states that SOU owns any works created by faculty members. See SOU Policy 580-043 and Internal Management Directive 6.205 through 6.255. [Exhibit 2.A.24 Intellectual Property Policies]

SOU Policy 580-043 provides that SOU employees, as a condition of their employment, "agree to assign to the University rights to":

a. Any invention or improvement in technology conceived or developed using institutional facilities, personnel, information, or other resources; and

b. Educational and professional materials, whether or not registered for copyright, that result from the instructional, research, or public service activities of the institution." [Exhibit 2.A.24 FAD.056 (580-043) Copyrights]

IMDs 6.205 through 6.255 articulate to which materials these policies apply and the available distribution of net royalty income between the University and employee with regard to intellectual property resulting in royalty income. [Exhibit 2.A.24 Intellectual Property Policies]

2.A.25 **The institution accurately represents its current accreditation status and avoids speculation on future accreditation actions or status. It uses the terms "Accreditation" and "Candidacy" (and related terms) only when such status is conferred by an accrediting agency recognized by the US Department of Education.**

Information about the University's current accreditation status can be found at several locations on the SOU website, including the Accreditation page of the Office of Institutional Research. Additionally, information regarding individual school and program accreditation can be found on their respective websites. These programs include Business (Accreditation Council for Business Schools & Programs, Chemistry (American Chemical Society), Music (National Association of Schools of Music), Clinical Mental Health Counseling Program (Council for Accreditation of Counseling & Related Educational Programs), and Education (Oregon Teacher Standards & Practices Commission).

2.A.26 **If the institution enters into contractual agreements with external entities for products or services performed on its behalf, the scope of work for those products or services—with clearly defined roles and responsibilities—is stipulated in a written and approved agreement that contains provisions to maintain the integrity of the institution. In such cases, the institution ensures the scope of the agreement is consistent with the mission and goals of the institution, adheres to institutional policies and procedures, and complies with the Commission's Standards for Accreditation.**

SOU ensures integrity of the Institution in matters of purchasing and contracting by adhering to contracting procedures developed by University Finance & Administration. Normal purchasing is covered by SOU guidelines on purchasing. In addition, SOU policies provide for public procurement and contracting are set forth in policies FAD 580-061-0000 (*et. seq.*), 580-062-0000 (*et. seq.*) and 580-063-0000 (*et. seq.*). [Exhibit 2.A.26 FAD 058 Professional Services], [Exhibit 2.A.26 FAD 057 Procurement and Contracting].

Contracts and grants are covered by policies on grants and contracts [Exhibit 2.A.26 AAD 027 Grants and Sponsored Programs].

The vice president for finance and administration (VPFA) is the designated contracts officer for the University and has delegated to specified and appropriate employees the authority to enter into certain specified contracts. The authority of such persons is clearly articulated at the University's Contracting Procedures web page. The VPFA and its designees are charged with ensuring contracts receive appropriate internal review by appropriate SOU officers, legal counsel, and other SOU personnel to ensure adherence to legal requirements, institutional policies and procedures, SOU's goals and mission, and NWCCU Standards for Accreditation.

## Academic Freedom

2.A.27 **The institution publishes and adheres to policies, approved by its governing board, regarding academic freedom and responsibility that protect its constituencies from inappropriate internal and external influences, pressures and harassment.**

Southern Oregon University is committed to the practice of academic freedom, in which faculty and students freely examine and test all knowledge appropriate to disciplines or areas of study.

The Collective Bargaining Agreement (CBA) between AP:SOU and Southern Oregon University guarantees academic freedom for faculty. Academic freedom is effectively broken down into three parts: Section C refers to freedom in the classroom; Section D refers to academic freedom in research; and Section E refers to overall freedom of expression. Grievances of alleged violations of academic freedom are allowed under Section 6 of the Faculty Bylaws and under CBA grievance procedure.

Faculty members are aware the concept of academic freedom is accompanied by the equally demanding concept of academic responsibility and maintaining appropriate standards of scholarship and instruction. Faculty members are entrusted with broad individual academic freedom to pursue and teach truth according to best practices in their discipline. Faculty and students alike are free to discuss and teach a variety of ideas in the context of learning and scholarship. In the exercise of academic freedom, faculty members are also bound to the expectations, responsibilities, and obligations of their office as employees of the University, but they do not speak for the University unless appropriately authorized to do so.

In 2014, the University administration and ASSOU leadership together revised and expanded the University's policy on speech activities on campus. SOU AAD.043 Speech Activities: Time, Manner, and Place Rules for Speech Activities on campus articulates SOU's commitment to broad principles that ensure the right to freedom of expression, debate, and dialogue in concert with the need to take steps to prevent or remediate any speech act sufficiently severe, pervasive, and objectively offensive to obstruct the right of any student to their educational opportunities. [Exhibit 2.A.27 AAD 043 Speech Activities]

For students, academic freedom is guaranteed in the Code of Student Conduct—which is outlined in 573-095-0005 and states that "The maintenance of academic standards is a joint responsibility of the students and the faculty at Southern Oregon University. Freedom to teach and freedom to learn are dependent upon individual and collective conduct to permit the pursuit and exchange of knowledge and opinion." [Exhibit 2.A.27 AAD 052 Grading Grievances]

2.A.28 **Within the context of its mission, core themes, and values, the institution defines and actively promotes an environment that supports independent thought in the pursuit and dissemination of knowledge. It affirms the freedom of faculty, staff, administrators, and students to share their scholarship and reasoned conclusions with others. While the institution and individuals within the institution may hold to a particular personal, social, or religious philosophy, its constituencies are intellectually free to examine thought, reason, and perspectives of truth. Moreover, they allow others the freedom to do the same.**

The mission and core themes of student success, intellectual growth, and responsible citizenship are both supported by and reflected in the ongoing operations of the University. Southern Oregon University is committed to offering a challenging and practical liberal arts education centered on student learning, accessibility, and civic engagement through its academic programs, partnerships, public service, and outreach. The University promotes and safeguards intellectual freedom by enabling the exchange of ideas and opinions while holding to standards that support the primary educational purpose of the University and ensure SOU's space and employee resources are primarily dedicated to the needs of the University and promote dialogue, debate, and the dissemination of information. The open exchange of ideas, thoughts, beliefs, and perspectives is encouraged and protected under SOU AAD 043 Speech Activities [Exhibit 2.A.27 AAD 043 Speech Activities], AAD 044 Academic Freedom [Exhibit 2.A.28 AAD 044 Academic Freedom], AAD 052 Academic Standards [Exhibit 2.A.27 AAD 052 Grading Grievances], SAD 015 Code of Student Conduct [Exhibit 2.A.28 SAD 015 Code of Student Conduct], FAD 036 Communication Guidelines [Exhibit 2.A.28 FAD 036 Communication Guidelines], the SOU Faculty Constitution and Bylaws, and the Collective Bargaining Agreement.

SOU supports and enables the free and open exchange of ideas and information between parties and communities not associated with the Institution, subject to expectations established by policies that govern speech acts on campus.

2.A.29 **Individuals with teaching responsibilities present scholarship fairly, accurately, and objectively. Derivative scholarship acknowledges the source of intellectual property, and personal views, beliefs, and opinions are identified as such.**

Teaching faculty at SOU produce a wealth of scholarship, research, and artistic creation. A more comprehensive view of faculty efforts in these areas is made possible by examining individual Faculty Professional Activity Reports (FPAR), which are submitted yearly by all full-time professorial and professional faculty. FPARs require faculty to report on their productive activities each year, against guidelines articulated in Section Five of the Faculty Bylaws and the expectations of each individual academic program.

As a result of a comprehensive and collaborative review of faculty roles and responsibilities initiated by the provost in 2008, each program's expectations for tenure and promotion—including expectations for standards in scholarship and other intellectual or creative products—were reviewed and revised. Each program generated its own specific expectations for scholarship, research, and creative activity while simultaneously confirming adherence to institution-wide standards for excellent and ethical scholarship/creative output. These expectations tie directly to the faculty bylaws as well as to specific aspects of each discipline and were subject to several layers of approval, starting with each program's division director (formerly dean) and proceeding to the Faculty Personnel Committee, Faculty Senate, and provost. These expectations are available on the Provost's Office website and are periodically reviewed by each program's faculty to reflect disciplinary and institutional changes.

Additionally, teaching faculty who conduct research on human subjects, either for their own scholarly development or in the supervision of student research, are held to fair and ethical practices as determined by the University's Institutional Review Board process.

Information and expectations pertaining to scholarship, research, and artistic creation reside in Academic Affairs, Finance & Administration, the Center for Instructional Support, AP:SOU, Faculty Senate, and Grants Administration.

## Finance

2.A.30 **The institution has clearly defined policies, approved by its governing board, regarding oversight and management of financial resources—including financial planning, board approval and monitoring of operating and capital budgets, reserves, investments, fundraising, cash management, debt management, and transfers and borrowings between funds.**

Pursuant to SB270, hundreds of rules and policies of the Oregon State Board of Higher Education and Oregon University System were transferred to SOU on July 1, 2015. These numerous transferred policies are published on the SOU website and are in the process of undergoing revision to be consistent with the University's format.

All former OUS and OSBHE policies will move or have moved to [Southern Oregon University's Policy Repository](). These policies include former OARs, ORSs, and IMDs that pertain to oversight and management of financial resources, including:

- Internal Management Policies (IMP), which provide policy for education-related business activities, auxiliaries, and other self-liquidating activities, Intercollegiate Athletics, and other Finance & Administration Policies provides policy for accounting, budget, gift grant and contract management, investment management, property procurement and management, licensing, patenting and professional materials development, copyright policies and procedures, financial management of bonded debt related to auxiliary enterprises and other self-liquidating activities, among others.

Many former Oregon Administrative Rules (OAR) are applicable to all institutions within the Oregon University System that provide additional guidance and policies related to fiscal management, including:

- accounting policies relating to receivables;
- gift, grant, and contract management (general authority, delegation, and institutional responsibilities);
- employee and institutional rights and responsibilities regarding policies relating to inventions, license agreements, and educational and professional materials development;
- relationships with institutional foundations;
- policies regarding real property, facilities, and campus planning;
- policies governing procurement and contracting;
- purchasing and contracting; and
- capital construction and contracting.

The SOU Fiscal Policy Manual is currently in development. It will serve as an online resource for management and staff in fiscal positions throughout SOU. The SOU Fiscal Procedures Manual will include links to applicable statutes, administrative rules, board policies, and other SOU fiscal policies. The policy FASOM sections will be transitioned and updated as time and resources permit. When this update process is complete, all applicable fiscal policies will have been transitioned into the SOU Fiscal Procedures Manual.

- accounting and reporting
- auditing
- roles and responsibilities for auxiliary enterprises
- budgeting
- cost accounting
- debt financing and management

- electronic commerce
- endowment management
- facilities management
- fixed asset administration
- managing employee fringe benefits
- general operations
- human resources
- legal issues
- payroll
- procurement and contracting
- risk management
- taxation
- travel
- treasury management

# 2.B HUMAN RESOURCES

**2.B.1 The institution employs a sufficient number of qualified personnel to maintain its support and operations functions. Criteria, qualifications, and procedures for selection of personnel are clearly and publicly stated. Job descriptions accurately reflect duties, responsibilities, and authority of the position.**

The University continues to implement highly intentional processes to ensure staff and faculty support for its mission and vision while managing significant fiscal challenges. Hiring in academic programs has been conservative and strategic over the past few years, particularly during retrenchment. Simultaneously, support areas have been restructured to be responsive and focus resources on student success and retention. Among the more recent visible efforts in this area is centered on the Division of Student Affairs. The University eliminated the positions of vice president for student affairs and dean of students and then collaboratively and intentionally restructured several entities with Student Life, Admissions, and Enrollment Services to advance its vision of increasing student retention and success.

This new organizational structure creates more integrated approaches to serving students while reducing overall costs. Student Life is now headed by a director who reports to the associate provost and oversees an associate director for social justice and service as well as two assistant directors (one for leadership, one for union and traditions).

In 2009, the University conducted an ambitious and comprehensive Program Prioritization Process, which entailed a comprehensive review of all programs based on the following principles:

- The process was to be open and transparent, with no a priori decisions having been made and with decisions made based on specific criteria collaboratively developed, approved, and publicized in advance of the process.

- To meet realistic priorities, all programs—academic and nonacademic—were ranked by quintile, with Quintile 1 indicating significant value to the Institution and Quintile 5 indicating a program to be eliminated or repurposed.

- The process provided the opportunity for enrichment of programs as well as the possibility of contraction or elimination.

- Commitment to evidence and data-driven decision making guided the process; to enable better decisions in the future, the large database established for prioritization will be maintained going forward.

- Consistency: The same study criteria will be applied to each program; only their measurement may change as appropriate.

- Inclusive: All University programs—instructional, student service, and administrative—will be analyzed, and all University employees will have the opportunity to participate in the analysis of their programs.

- Demand-driven: The study will measure the demand for all programs as determined by students, employers, or internal constituents.

- Data-based: The study will be based on both quantitative and qualitative data.

This Prioritization Process engaged all programs on campus and initiated regular and ongoing assessment of efforts to support SOU's mission of student success, intellectual growth, and responsible citizenship while fostering intentional decision making supported by qualitative and quantitative measures. Prioritization expressed commitment to accountability and responsive decision-making, as outlined in the following:

"Although the ongoing disinvestment in public higher education is a significant challenge, it does not excuse the fact that our costs and tuition increases are on an unsustainable trajectory. Our stewardship of both public funds and student tuition means we must always be assessing what works, what doesn't, and what programs or efforts should ultimately be adjusted. Financial pressure aside, these efforts are even more important as we are accountable to our students, their families, and the public to ensure we are achieving the mission of the Institution". The process was designed to ensure that the use of resources is truly aligned with the University's mission and commitment to student success.

Even as these processes are ongoing, some support functions at the University have been adversely impacted by reductions in budget and continue to function at less than ideal capacity. Included in this are areas such as Human Resource Services and Business Services, where positions have been eliminated and work distributed to existing staff. Some functions previously provided by these departments have been curtailed or eliminated altogether. Some departments have become more reactive and less proactive in their operation.

The following charts illustrate staffing levels from fall 2009 through fall 2015:

**Chart 1: Ratios of Faculty and Staff Headcount to Student Headcount**
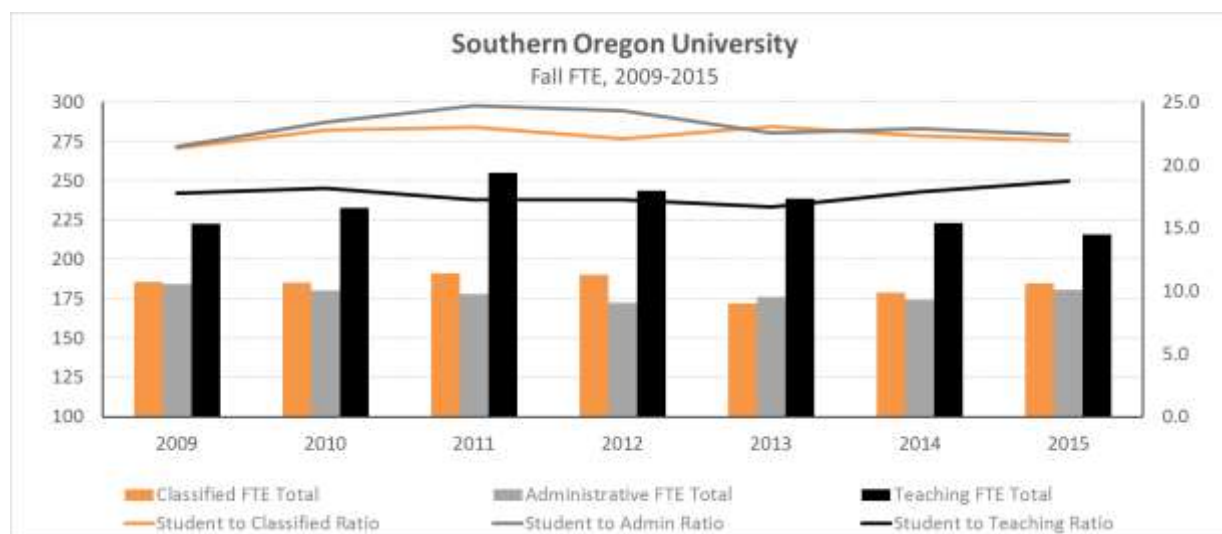


**Chart 2: Chart Values for Faculty and Staff Headcount to Student Headcount Ratio**

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 7 Yr. Avg. |
|---|---|---|---|---|---|---|---|---|
| Classified FTE Total | 185.4 | 185.2 | 191.1 | 190.0 | 172.0 | 178.9 | 184.5 | 201.8 |
| Student to Classified Ratio | 21.3 | 22.8 | 23.0 | 22.1 | 23.1 | 22.3 | 21.9 | 22.4 |
| Admin FTE Total | 184.1 | 180.0 | 177.8 | 172.6 | 176.2 | 174.4 | 180.7 | 178.0 |
| Student to Admin Ratio | 21.5 | 23.4 | 24.7 | 24.3 | 22.5 | 22.9 | 22.4 | 23.1 |
| Teaching FTE Total | 222.7 | 232.6 | 255.0 | 243.7 | 238.4 | 223.0 | 215.8 | 226.3 |
| Student to Teaching Ratio | 17.8 | 18.1 | 17.2 | 17.2 | 16.7 | 17.9 | 18.7 | 17.7 |
| Student FTE Enrollment (excluding dual-enrolled HS students) | 3974.2 | 4579.6 | 4769.9 | 4629.1 | 4333.8 | 4356.0 | 4414.3 | 4268.6 |

**2.B.2 Administrators and staff are evaluated regularly with regard to performance of work duties and responsibilities.**

Administrators and staff are evaluated by their immediate supervisors annually as outlined in SOU Policy FAD.012 Performance Management for Administrators [Exhibit 2.B.2 Performance Mgmt for Admin]. The policy states, "In addition to ongoing dialogue and feedback, each employee and supervisor are expected to engage in a formal performance review at least once a year." Performance reviews may also be conducted at more frequent intervals. Reviews should include discussion of the employee's responsibilities and performance while identifying opportunities to meet performance goals, criteria for performance-based increases, and plans for professional development. Formal performance reviews are documented using one of several formats made available on the Human Resource Services (HRS) website. Annual reviews should also include discussion of any performance-related issues or concerns as well as any corrective actions, if needed, and as stipulated.

Some programs are more diligent about maintaining this standard than others, and compliance with this policy is not universal. Human Resource Services continues to seek ways to provide training and support for individual managers and supervisors as needs are identified and time permits.

Classified staff are similarly expected to be evaluated annually as described in Article 54, Section 2 of the Collective Bargaining Agreement: "Every employee shall receive a performance evaluation annually by the employee's anniversary date." [Exhibit 2.B.2 SEIU CBA]

Employees have the opportunity to append their own comments to the evaluation and share these with their supervisor for discussion and any changes. Both parties should agree to any changes before signing off on the evaluation. Classified employees also serve an initial trial service period of six months when their employment is full-time and nine months when their employment is less than half-time. These employees are regularly evaluated during this period to assess their ability to perform the essential functions of their position. These trial service evaluations are monitored by Human Resource Services to ensure they are being completed. As with the annual evaluations of administrative staff, completion is better in some programs than others with particular difficulty in academic support areas where supervisors change regularly as program chairs rotate assignments. The transition to the Service Center structure in 2014 has created more stability and compliance with HRS processes such as these. Human Resource Services has also partnered with Information Technology (IT) to implement a process by which an auto-generated email notification is sent to supervisors when an employee's evaluation is due. This has greatly improved performance evaluation completion rates for classified staff.

The University president and vice presidents undergo an advisory evaluation every year as outlined in the Faculty Constitution and Bylaws. Further, the vice presidents are required by the president to annually prepare a list of goals and tasks they hope to accomplish and are evaluated based on attainment of those goals.

2.B.3 **The institution provides faculty, staff, administrators, and other employees with appropriate opportunities and support for professional growth and development to enhance their effectiveness in fulfilling their roles, duties, and responsibilities.**

As outlined in the Collective Bargaining Agreement Article 9, Section B, Professional Development Accounts (PDAs) are provided to support each full-time professorial and professional faculty members' performance in the areas of teaching, scholarship, or service. Approval for use of these funds is contingent on the member demonstrating to the chair how the proposed use of the funds will support activities or goals described in the member's approved annual Faculty Professional Activity Plan. From 2016 forward, separate Professional Activity Plans will be discontinued, and planning and objectives will be included in the annual Faculty Activity Report using Activity Insight software. Examples of approved uses of PDA include: professional travel; purchase of equipment, software, or other materials; use of consultants; release time for professional activities or summer stipends for scholarly activities; and professional society dues, books, and journal subscriptions. Durable goods purchased with these funds shall be the property of Southern Oregon University.

Each full-time professional faculty member with an ongoing appointment will be allocated $825, and each full-time professorial faculty member with an ongoing appointment will be allocated $1,375. As per the 2015–18 Collective Bargaining Agreement, an additional $126,000 is also allocated to annual Professional Development Grants for which faculty may apply via proposal submitted to the Faculty Development Committee. According to the CBA, "Priority shall be given to proposals for substantive activities related to: course revision, assessment, improvement of teaching methodology and skills, updating faculty in their disciplinary fields, retraining faculty for new assignments, providing instructional resources, and developing interdisciplinary courses, scholarship, and academic conference travel." Proposals should be consistent with the faculty member's professional appointment and may be evaluated by the provost in consultation with the Faculty Development Committee for alignment with institutional priorities.

The Center for Instructional Support assists faculty members with professional development by providing resources, technology support, training, and pedagogical assistance. In addition to ongoing and on-call services for faculty around teaching activities, CIS also implements programming for faculty, including new, adjunct, and other faculty orientation. An example is a Faculty Writers Group held during 2015–16, which provided peer support and professional development resources for faculty members to generate a journal article or other publications over the course of one academic quarter. CIS also implemented the Curriculum Design Academy (CDA), a Student Success Initiative emphasizing curriculum/course design; best teaching practices; and collaboration to meet objectives of student success, retention, and persistence, and completion for first-year, foundational, or "gateway" courses with high percentages of D, F, I, E, or Withdrawal grades among students. CDA is a yearlong professional development academy for teams of faculty and program chairs, including stipends and funds for programs; course and curriculum design workshops; and collaboration around course

design, assessment, and outcomes. CDA is slated to continue through 2016–17. In 2015–16, four program teams from Mathematics, Foreign Languages, Psychology, and University Seminar participated in CDA and will introduce newly redesigned gateway courses in the 2016–17 academic schedule.

Administrative and classified staff are provided with numerous on-site development opportunities, including software training provided by the IT Department. Training classes have included: Excel, Google and Gmail, Office OneNote, Qualtrics Survey Software, Clicker Technology, Microsoft Office, Adobe Acrobat, Word Level I, Word Level II, Word Level III, Moodle, and Banner. With the introduction of DegreeWorks, SOU's new advising support software, IT and Enrollment Services staff have provided training to all full-time program faculty with advising assignments.

Various other campus entities provide training and professional development opportunities, including Human Resource Services, which trains search committee members on PeopleAdmin and best practices for recruiting, including diversity. HRS also provides training in leadership development, and sexual harassment training is administered to each new employee. All employees are asked to retake the training every two years. HRS will work with SOU's diversity and inclusion director to ensure all employees are provided additional training opportunities with the implementation of online training in Title IX, the Campus Safe Act, VAWA, and FERPA. An online FERPA training via Moodle has been available on demand to faculty and staff.

**2.B.4 Consistent with its mission, core themes, programs, services, and characteristics, the institution employs appropriately qualified faculty sufficient in number to achieve its educational objectives, establish and oversee academic policies, and ensure the integrity and continuity of its academic programs, wherever offered and however delivered.**

Southern Oregon University has an orderly process for the recruitment and appointment of full-time faculty and is committed to diversity in its hiring practices. The hiring process is collaborative, involving faculty, staff, and administrators in consultation with Human Resource Services. In addition, the SOU Faculty Bylaws, Section 5.100 and Article 10 of the AP:SOU Collective Bargaining Agreement govern initial appointments. Job opportunities are advertised nationally, regionally, and locally through a variety of venues such as the *Chronicle of Higher Education*; local and regional newspapers; and discipline-specific publications, associations/memberships, and websites. Human Resource Services also provides analytics and guidance on recruiting sites and encourages, where appropriate, sites that reach diverse and underrepresented communities. Academic degrees, professional expertise, and experience are weighed by programs to uphold academic standards in each course and program.

Applicants submit their application materials directly through PeopleAdmin, SOU's recruitment management system. Applications are then evaluated by each member of the search committee for minimum and preferred qualifications. A list of qualified and acceptable candidates is generated for the purpose of virtual or telephone interviews with the search

committee; from that pool, the names of two to four candidates are submitted to the director and Provost's Office for approval for campus visits. The search committee is generally responsible for handling the details of on-campus interviews. Human Resource Services is updated and consulted frequently with regard to the search process.

In the case of term-by-term (adjunct) faculty, each academic program keeps a pool of resumés on file from which individuals may be chosen based on the program's determination of the necessary academic credentials to teach a course within that specific program or discipline. Updated in AY 2015–16, the SOU Adjunct Faculty Handbook [Exhibit 2.B.4 Adjunct Faculty Handbook] focuses on curriculum and instruction guidelines as well as providing additional information regarding campus and federal policies (e.g., FERPA, Title IX, and mandatory reporting), Moodle assistance, syllabus guidelines, student support services, and faculty and student resources. It also includes the services and resources provided by the Center for Instructional Support, which emphasizes a combination of traditional forms of pedagogy and new technologies.

SOU faculty have a long history of actively shared governance with the administration. The Faculty Constitution and Bylaws have been in existence for nearly 50 years. The Faculty Senate is sanctioned by the constitution and is the primary faculty advisory body to the president of the University.

Full-time faculty (instructor or higher, .5 FTE or higher) have been unionized since 1973. The faculty union, Association of Professors: Southern Oregon University (AP:SOU), is an independent union not affiliated with any state or national organization. The terms of the faculty's compensation and working conditions are negotiated through the AP:SOU Collective Bargaining Agreement. The union represents the faculty in matters of enforcement of the CBA. AP:SOU and the SOU administration have a long history of constructive engagement. AP:SOU and the Faculty Senate complement one another in giving faculty effective voice in governance.

Through the bylaws of the constitution, several faculty committees perform particular functions related to the governance of the Institution. Some important examples include the Curriculum Committee, University Planning Board, Graduate Council, Senate Advisory Council, and University Assessment Committee. The Curriculum Committee includes six faculty members and three ex officio members. It receives all proposals by programs for curricular and/or Catalog changes such as new and modified courses; modifications to majors, minors, and certificates; and new degree programs. Similarly, the Graduate Council monitors changes to existing graduate programs and new graduate programs as well as general policies and procedures governing graduate study at SOU, including admissions. The University Planning Board consists of faculty, staff, students, and administrators and is charged with ensuring effective collaboration between University planning and resource allocations as well as providing transparency to strategic planning and budgeting. The Senate Advisory Council comprises six faculty members from the Faculty Senate (including the current and past chairs

and secretary). Advisory Council meets every other week with the president and provost. In addition to setting the agenda for Faculty Senate meetings, this group advises the president and provost on matters of mutual interest between faculty and administration.

In addition to the standing committees of the Faculty Senate, ad hoc committees and task forces are occasionally formed by the senate or University president.

**2.B.5 Faculty responsibilities and workloads are commensurate with the institution's expectations for teaching, service, scholarship, research, and/or artistic creation.**

Per the CBA, [Exhibit 2.A.1 Faculty Collective Bargaining Agreement] the Professional Faculty teaching load is 44 to 45 Equated Load Units (ELUs) per year (12 to 16 per term), and the Professorial Faculty teaching load is 36 ELU per year (12 per term). Faculty loaded above (or below) these levels may be compensated for their overload (or underload) through their ELU bank. When overloads cannot be compensated through the ELU bank, overload pay may be considered as per Article 19 of the CBA.

In principle, all faculty members can request a reduced load for professional activities if a source of funding to cover the instruction (e.g., a qualified term-by-term instructor) for the released course can be found. The CBA (Article 9) provides some monies that can be used for this purpose. The current CBA gives each full-time professional faculty member with an ongoing appointment a personal professional development account ($1,375 per member per year for professorial faculty; $825 for professional faculty) that supports professional travel, equipment and software purchases, and some backfill for release time. The CBA also provides faculty with a source of funding through the Professional Development Grant, and faculty-awarded grants may include in their budgets funding for release time at the time of application.

Specific information pertaining to expectations regarding scholarship, research, and artistic creation resides in the Provost's Office, AP:SOU Collective Bargaining Agreement, Faculty Senate Bylaws, and Grants Administration and is available on the relevant websites. Since SOU's last accreditation report, each academic program has articulated discipline-specific scholarship criteria. The intent of this initiative was based a collaborative effort on the part of the administration and Faculty Senate to recognize a broader, richer definition of scholarship that includes discovery, application, integration, and teaching, resulting in increased clarity about scholarship, research, and artistic creation.

In general, criteria for scholarly activity centers on pursuing *and* sharing new knowledge or insight. Scholarly activity may vary over a faculty member's career and be demonstrated in a variety of ways. However, common to all should be:

- Originality: creating new knowledge, insight, or artistic works
- Meaningfulness: contributing to the profession or the public good
- Review: affirmation of meaningful contribution by appropriate peers

- Dissemination: sharing work beyond the University

Detailed information about expectations relevant to hiring, promotion, tenure, teaching, and service is presented broadly in the Faculty Constitution and Bylaws. Program-specific expectations are housed on the [provost's website](#). The support outlined above allows SOU faculty to produce a wealth of scholarship, research, and artistic creation. Examining individual annual Faculty Professional Activity Reports enables a more comprehensive view of faculty efforts in scholarship, research, and artistic creation.

**2.B.6 All faculty are evaluated in a regular, systematic, substantive, and collegial manner at least once within every five-year period of service. The evaluation process specifies the timeline and criteria by which faculty are evaluated; utilizes multiple indices of effectiveness, each of which is directly related to the faculty member's roles and responsibilities, including evidence of teaching effectiveness for faculty with teaching responsibilities; contains a provision to address concerns that may emerge between regularly scheduled evaluations; and provides for administrative access to all primary evaluation data. Where areas for improvement are identified, the institution works with the faculty member to develop and implement a plan to address identified areas of concern.**

SOU faculty members are evaluated according to the terms of their appointment. All term-to-term faculty members are evaluated at least once every three years or every 45 ELU, whichever is sooner. All faculty members on one-year fixed term appointments are evaluated annually, except when a colleague evaluation is scheduled. All faculty members planning to apply for promotion have a colleague evaluation within two years of applying for promotion (one year is recommended). All tenured faculty members and those on three-year extendable appointments have a colleague evaluation at least once every five years.

Prior to AY 2016–17, the format and processes for faculty evaluations included an annual Faculty Professional Activity Plan (FPAP); annual Faculty Professional Activity Report (FPAR); annual evaluations by chair for non-tenured faculty; and evaluations by chair or colleagues for tenured faculty. These approaches include some level of review of scholarship, research, or artistic creation with criteria distinguished by different ranks. Guidelines for these reports and processes are electronically disseminated by the Office of Academic Affairs on an annual basis and are included in the current edition of the Program Chairs Handbook. It is the program chair or coordinator's responsibility to provide access to information pertaining to personnel guidelines, Faculty Constitution and Bylaws, and CBA at the time of hire.

Starting in fall 2016, faculty reporting will change. With the implementation of new faculty activities and reporting software and in response to feedback from program faculty, chairs, and division directors, the Provost's Office has worked to address perceived shortcomings in the faculty evaluation and reporting process. Faculty and chairs report the existing process provided only limited opportunity for feedback and discussion of professional goals. In

addition, FPARs (reporting on the previous academic year) were due in the fall, and FPAPs— projecting out to the next academic year—were due in the spring. It was perceived that faculty were unable to use the reports as a meaningful reflective exercise or to work with their supervisors to assess the past year and determine future goals. A fillable PDF form implemented in 2014 also created access and completion barriers for some faculty members, impeding the timely and satisfactory submission of faculty plans and reports.

A new schedule and software program was submitted to Faculty Senate for approval in 2016, eliminating the Faculty Professional Activities Plan and instead enfolding plans and goals into the annual Faculty Professional Activities Report while also using Activity Insight, a software program that enables a more comprehensive and dynamic approach to faculty reporting. The software offers additional functionality such as management of tenure and promotion applications and approval processes; sabbatical applications; chair and colleague evaluations; and full faculty CVs. Implementation of Activity Insight began with tenure and promotion applications in AY 2015–16 and will continue to be implemented in phases over the next one to two years.

# 2.C EDUCATION RESOURCES

**2.C.1 The institution provides programs, wherever offered and however delivered, with appropriate content and rigor that are consistent with its mission; culminate in achievement of clearly identified student learning outcomes; and lead to collegiate-level degrees or certificates with designators consistent with program content in recognized fields of study.**

The goals and objectives of our education programs have benefited from rigorous examination of outcomes and assessments as part of our ongoing efforts to ensure institutional accountability and mission fulfillment. These efforts are supported by institution-wide committees and evaluative bodies who are working on the establishment of integrated institution-wide metrics for the development, evaluation, and approval of programmatic goals and objectives.

The general education requirement for every degree program at SOU is clearly outlined in the SOU Catalog, as are the learning programs for courses, programs, and degrees. Every major requires:

1. 12 lower division writing or communication credits (usually fulfilled by enrollment in the University Seminar series);
2. an additional minimum of 36 lower division general education credits (12 in humanities, 12 in social sciences, and 12 in sciences);
3. 4–8 credits in quantitative reasoning; and
4. 9–12 upper division general education credits.

2.C.2 **The program identifies and publishes expected learning outcomes. Expected learning outcomes for courses are provided in written form to enrolled students.**

SOU has implemented a formal, systematic university-wide assessment program. All programs have identified their program outcomes, articulating the knowledge, dispositions, and skills outcomes expected for all graduates of that program. Program course offerings have been mapped to program outcomes. The assessment coordinator or chair/coordinator for each program enters and maintains the outcome information stored in SOU's assessment system, TracDat, which is used for data collection and analysis. Members of the University Assessment Committee conduct program reviews annually, giving feedback on the quality and comprehensiveness of program outcomes, course alignment to program goals (examining syllabi provided by the programs), and methods the program uses to communicate the program outcomes to students.

Programs use various means to publish expected learning outcomes. The most common is to include them on the program website. Other programs use advising worksheets; integrate program outcomes into syllabi; build program outcomes into assignment rubrics; publish the outcomes in the course site; post them in program offices; include them in Student Handbooks; and, in several cases, create posters displayed for students in public sites (e.g., Communication and Environmental Science & Policy). A review of program conformance to this requirement shows 60% of programs are publishing their outcomes. SOU is undergoing a full website redesign, and the program page templates will include program outcomes. This is intended to help ensure all programs' outcomes are published, kept up-to-date, and made widely available to students.

Almost all programs (95%) have adopted the practice of providing syllabi with learning course outcomes mapped to enrolled students. Some programs include all outcomes on all their syllabi, while the practice of explicitly mapping program outcomes to the course's learning outcomes is becoming more widespread. Some exemplars include the School of Business [Exhibit 2.C.2 BA 427 Business Policy & Strategy Syllabus], Communication [Exhibit 2.C.2 COMM 475 Organizational Communication Syllabus], Early Childhood Development [Exhibit 2.C.2 ED 407 Infant-Toddler Devl & Curr Syllabus], Elementary Education [Exhibit 2.C.2 ED 457a Introduction to Curriculum & Instruction Syllabus], Environmental Science & Policy [Exhibit 2.C.2 ES 310 Environ Studies II Syllabus], Innovation & Leadership [Exhibit 2.C.2 EMDA 299 Digital Portfolios Syllabus], and Language & Culture (using syllabus inserts that detail program outcomes) [Exhibit 2.C.2 Lang Culture Outcomes Supplement for Syllabi]. Mathematics conducts advising by outcome [Exhibit 2.C.2 Math Advising by Outcome], which provides the context for each program outcome and the course(s) that map to it in an accessible narrative format.

Looking ahead, SOU has instituted policies and practices to ensure courses identify and align learning outcomes to program outcomes. One such change has been implemented by the University Studies Committee, which now requires faculty applying for approval of a course for

University Studies strand credit to provide evidence of alignment of course learning outcomes to program (University Studies) outcomes and demonstrate embedded assessment.

In addition, faculty who receive a stipend to develop or redesign a course are required to work with the Center for Instructional Support (CIS). The CIS provides faculty development and support and assists faculty with course design and redesign. The redesign process involves working with faculty to clearly describe learning outcomes for the course mapped to the program outcomes associated with the course as well as mapping teaching and learning activities to the course learning outcomes. In other words, assessment is embedded. For an explanation of the process and an example of a course redesign using this process, see Computer Science 346 Course Design, Review & Delivery Process [Exhibit 2.C.2 CS 346 Design Review Delivery Process], CS346 Online Version: Course Assessment Plan [Exhibit 2.C.2 CS 346 Online Course Assessment], and CS 346 Computer Forensics syllabus [Exhibit CS 346 Computer Forensics Syllabus].

In AY 2015–16, CIS assisted faculty with designing/redesigning 14 courses to incorporate fully embedded assessment—from program outcome through course learning outcome to teaching and learning activity outcomes. For example, see BA428 Applied Research [Exhibit 2.C.2 BA 428 Applied Research Syllabus], EMDA 299 Digital Portfolios [Exhibit 2.C.2 EMDA 299 Digital Portfolios Syllabus], and SC110 Concepts in Science: Energy [Exhibit 2.C.2 SC 110 Concepts in Science – Energy Syllabus]. As part of the Curriculum Design Academy, CIS is working with four faculty teams (12 faculty) to redesign six additional courses using the same approach; these are to be offered in fall 2016, with another three to four to be offered in 2017.

2.C.3 **Credit and degrees, wherever offered and however delivered, are based on documented student achievement and awarded in a manner consistent with institutional policies that reflect generally accepted learning outcomes, norms, or equivalencies in higher education.**

Degree requirements are outlined in the SOU Catalog under General Degree Requirements. Expectations for University Studies and requirements for the bachelor of arts, bachelor of fine arts, and bachelor of music degrees are defined. Requirements are also posted on the Academic Support Programs website and in DegreeWorks, the online advising tool used by professional advisors, faculty advisors, and students to track their progress toward degree. The Graduate Studies section offers general information regarding graduate program expectations as well as links to each individual program and their requirements.

Core curriculum, academic progress, minimum GPA, academic standards, and other expectations meet or exceed minimum requirements for generally accepted norms in higher education or correspond to expectations as determined and vetted through the state Provosts Council, OSBHE (prior to 2015), and external accreditors in the case of accredited programs.

Each individual major, minor, certificate, and graduate program expresses requirements for the degree on program web pages and advising resources. Included are required course, electives, prerequisites, course sequencing, and expectations for satisfactory academic progress.

**2.C.4 Degree programs, wherever offered and however delivered, demonstrate a coherent design with appropriate breadth, depth, sequencing of courses, and synthesis of learning. Admission and graduation requirements are clearly defined and widely published.**

Admission and graduation requirements are clearly delineated at SOU. These requirements are codified in the [Catalog](), which is available at the University website. The Office of Admissions disseminates admission requirements information via its website as well as a variety of print publications. Individual academic programs, Office of the University Registrar, and Academic Support Programs publish and distribute graduation requirements via websites, print materials, and individual interventions with students during advising and other academic support functions. As of 2015–16, students and academic advisors also have access to a new degree audit and planning system (DegreeWorks), which greatly aids in course planning, transparency of degree requirements, and curricular path options. All such policies are in full compliance with state and federal regulations and guidelines.

**2.C.5 Faculty, through well-defined structures and processes with clearly defined authority and responsibilities, exercise a major role in the design, approval, implementation, and revision of the curriculum, and have an active role in the selection of new faculty. Faculty with teaching responsibilities take collective responsibility for fostering and assessing student achievement of clearly identified learning outcomes.**

The design of each academic program originates within the jurisdiction of faculty members in the programs. According to Article 3 Section 2.I of the Faculty Constitution, faculty members have the right to "act upon and advise the president on all matters of educational policy within the limits prescribed by federal and state law and the regulations of the [Higher Education Coordinating Commission]."

Changes in curriculum of any type undergo a well-defined, systematic process that begins at the program level and moves through the appropriate Faculty Senate committee. Materials delineating procedures for [curricular change]() are posted on the Provost's Office website.

Proposed degrees, programs, and certificates originate with faculty at the program level and are then routed through several levels of approval: first, from program chair to division director, then to the University Curriculum Committee or Graduate Council (for graduate programs); then to the Faculty Senate. Following approval by the Faculty Senate, proposals are presented to the SOU Board of Trustees, Oregon University System Provosts Council (prior to 2015, the Oregon University System Provosts Council) for evaluation and recommendation, and then to the Higher Education Coordinating Commission.

The Faculty Senate Curriculum Committee's charge is to "study existing curricula and consider all changes in curricula including degrees offered, degree requirements, and specific courses." The Curriculum Committee comprises six teaching faculty and three ex officio administrative members, including the registrar and associate provost. Its charge is to review and approve all additions or deletions of undergraduate courses or programs as well as changes to curricular structure (e.g., prerequisites, electives, or credit hour requirements). The committee then submits its recommendations to the Faculty Senate for approval. The University Studies Committee reviews courses proposed for inclusion in general education. The Graduate Council (GC), another Faculty Senate committee, reviews additions, deletions, and changes to graduate-level programs and courses.

Each of these committees is senate-appointed and made up of a representative body of diverse faculty members from each academic division, plus the library. The Curriculum Committee reviews the courses from a managerial perspective, determining whether:

1. the University has adequate library resources for a course;
2. the program has adequate staffing;
3. and the necessary prerequisites have been identified and scheduled appropriately to promote student access to and success in the new course; and
4. each proposed course or program is pedagogically sound.

Several programs are also accredited by external evaluators: Business (Accreditation Council for Business Schools & Programs, Chemistry (American Chemical Society), Music (National Association of Schools of Music), Clinical Mental Health Counseling Program (Council for Accreditation of Counseling & Related Educational Programs), and Education (Oregon Teacher Standards & Practices Commission). These accrediting agencies further ensure that a) these specific programs have appropriate course sequences, content, and assessments and b) objectives and descriptions are accurate and appropriate for the offered degrees.

The schedule for curricular maintenance at Southern Oregon University is aligned with the publication of an annual, accurate, up-to-date course catalog.

Every year, the Curriculum Committee, USC, and GC review courses (and programs, in the case of the CC and GC) submitted for addition and elimination. Curriculum Committee meets weekly, but is often challenged to complete the management of all annual curricular adjustments while reporting to Faculty Senate in a timely way.

Over the past several years, the University Assessment Committee and Curriculum Committee, working with other appropriate entities such as Academic Policies Committee, have addressed the following institution-wide curricular issues:

- the creation of a common, streamlined process for the design and review of courses, regardless of whether the course is designed for a major or University Studies as clearly outlined in a curriculum process manual;

- the identification of criteria for which a course will be assigned a course number, establishing benchmarks of rigor for 100-, 200-, 300-, and 400-level courses as clearly outlined in a curriculum process manual available on the provost's web page under Curriculum Management;
- the creation of a clear plan for annual program review that feeds into institutional review and evaluation process for student achievement via the TracDat database tracking system;
- the establishment of a system for monitoring potential course redundancy; and
- the reviewing and elimination of issues with cross-listed courses.

Every educational program at Southern Oregon University has now articulated student knowledge, skill, and disposition outcomes for graduates in their programs. Those outcomes have been entered into the TracDat system along with the means of assessment for each outcome. Academic programs are now in the process of mapping their various curricula to the learning outcomes and means of assessment to measure student achievement.

University Seminar (USEM), our yearlong freshman seminar, has provided the Institution with the most evidence that assessment of student achievement leads to the improvement of teaching and learning. Over the years, the USEM program has collected a great deal of diagnostic data that have been used by its faculty to modify the curriculum and as a baseline from which assessment of senior-level proficiencies and value-added gains can be gauged.

USEM faculty members designed a diagnostic essay assessment tool to be embedded in all sections of USEM at the beginning and end of the year. Data from the diagnostic essays are used to monitor individual student achievement; included is a pre-assessment to use in the design and implementation of each section of USEM (catering rigor to academic proficiencies). Achievement data from these diagnostic essays are also used to guide professional development for USEM faculty and monitor student achievement longitudinally. In addition, these embedded assessments also provide institutional baseline data in the following areas:

1. use of standard English,
2. writing organization, and
3. the construction of logical arguments (a type of critical thinking used across all disciplines).

Similar efforts have been implemented for the senior capstones, for which assessment rubrics for the foundational learning outcomes of critical thinking, communication, and information literacy are used by the University Assessment Committee to score a random sample of capstone papers.

The Collegiate Learning Assessment (CLA) is another source of large-scale data that has been collected to situate SOU within a national context. SOU also participates in the Multi-State Collaborative.

2.C.6 **Faculty with teaching responsibilities, in partnership with library and information resources personnel, ensure that the use of library and information resources is integrated into the learning process.**

Information literacy is one of four foundational strand goals at SOU. It is therefore central to the entire University Studies curriculum, from University Seminar to the capstone experience. According to the Hannon Library Mission Statement [Exhibit 2.C.6 Library Mission Statement], the purpose of information literacy and instruction is to "teach students and assess their ability to think critically and use information for their academic, professional, and personal lives."

Because information literacy is a foundational goal, all programs incorporate library and information resources in the learning process. Most programs have a research-intensive capstone course that requires the use of library collections. In Business, two business research courses—BA 427 Business Policy & Strategy [Exhibit 2.C.6 BA 427 Business Policy and Strategy Syllabus] and BA 428 Business Research [Exhibit 2.C.6 BA 428 Business Research Syllabus]—are required before a final business plan is developed in BA 499 Business Planning [Exhibit 2.C.6 BA 499 Business Planning Syllabus]. The research courses require the use of peer-reviewed information sources, and the subject specialist librarian for the School of Business teaches several in-course sessions on library resources and research. The International Studies Capstone course [Exhibit 2.C.6 IS 498 Intl Studies Capstone Syllabus] requires a research project that "demonstrates the student's ability to research, analyze, interpret, and present in writing an international topic of special interest or passion for the student." Physics students have a choice in their final research project: a capstone course or PH 434: Advanced Laboratory. Both courses require students use library information resources.

Library and information resources are not limited to capstone courses, or even senior-level research and writing courses. Criminology & Criminal Justice introduces "oral and written communication and information literacy skills essential to the criminal justice discipline" in CCJ 300: Essentials of Criminal Justice Research Writing [Exhibit 2.C.6 CCJ 300 Essentials of Crim Justice Res Writing Syllabus]. This work continues in CCJ 400: Capstone Research [Exhibit 2.C.6 CCJ 400 Capstone Research Syllabus]. Prior to the Capstone course, EC 495, the Economics Program offers EC 320: Introduction to the International Economy [Exhibit 2.C.6 EC IS 320 Intro Intl Economy Syllabus], which assigns a research paper. The syllabus identifies and provides contact information for the economics subject librarian. In English, EN 298: Introduction to Literary Study [Exhibit 2.C.6 ENG 298 Intro to Literary Study Syllabus], the introduction-to-the-major course, has a research paper assignment and the subject specialist librarian for the program teaches students how to use information resources related to English. In EN 300: Introduction to Literary Theory [Exhibit 2.C.6 ENG 300 Intro Literary Theory], students review information literacy, and complete an annotated bibliography and critical research essay with seven scholarly sources. EN 400: Capstone [Exhibit 2.C.6 ENG 400 Capstone I Syllabus] includes both an annotated bibliography and a research paper. Environmental Science & Policy has three writing-intensive course in which information literacy is a central element: ES 210, ES 310: Environmental Studies II [Exhibit 2.C.6 ES 310 Env Studies II Syllabus], and the Capstone course,

ES 494C. The research project in ES 310 includes three distinct assignments related to information literacy: a library research working document, a working bibliography with at least eight scholarly sources, and an annotated or "mapped" bibliography. History & Political Science requires students construct a bibliographic review of literature in HST/PS 300: Research and Writing. Library research is required in all three courses in the Atlantic World sequence (HST 345–347). In PS 436: Health Care Policy, students must conduct research using government documents, and work closely with the Government Documents librarian. In PS 311: Research Methods, students develop an annotated bibliography. In the Capstone courses, HST 415/PS 498: Senior Seminar, students are required to define a research question, conduct research in secondary and, ideally, primary sources, and compose an extensive paper. The subject librarian provides instruction in library resources early in the course. Students are expected to make use of all finding aids and research materials relevant to their topic. The Honors College assesses student information literacy in HON 101-102-103 (the first-year introductory writing sequence), HON 301: Leadership, and HON 490: Capstone [Exhibit 2.C.6 HON 490 Honors College Capstone Syllabus]. In the Languages & Culture Program, coursework in SPAN 311: Hispanic Culture, Composition, and Conversation [Exhibit 2.C.6 SPAN 310 Hispanic Culture Comp Conv Syllabus], SPAN 312, and all 400 level courses require student research. The subject librarian also works with the capstone course every year for a library information and research session. In addition to OAL 443: Senior Capstone, the Outdoor Adventure Leadership Program requires another writing-intensive course to help develop students' information literacy skills—OAL 425: Program Evaluation [Exhibit 2.C.6 OAL 425 Program Evaluation]. Psychology students are required to take at least two research and writing courses: PSY 325: Writing and Research in Psychology and PSY 498/499: Research Capstone. Two courses in Sociology & Anthropology include lab training with the reference librarian. In addition to the senior Capstone sequence (SOAN 414A/B/C), two courses are specifically designed to develop professional writing and research skills: SOAN 301: Social Science Research and Writing and SOAN 326: Introduction to Social Research Methods. All students in the three-term first-year seminar sequences—University Seminar and Houses— receive at least one library instruction from library faculty. At the conclusion of the sequence, all students must write the FUSE essay, which includes an assessment of information literacy competency. *Skeptic House* includes an annotated bibliography assignment [Exhibit 2.C.6 Skeptic House Bibliography Assignment] and USEM 102: Witnessing Reality II [Exhibit 2.C.6 USEM Witnessing Reality II] is an introductory research course in which students are introduced the process of scholarly research.

Several programs do more than incorporate library and information resources in the learning process. The School of Business has identified information literacy as one of its own Learning Outcomes, defining it in terms of the ability to "access, use, and evaluate information in business decision making." The subject librarian for Gender, Sexuality, & Women's Studies (GSWS) has been a member of the GSWS Council since fall 2013, contributing to curricular and pedagogic development of the program. Native American Studies (NAS) examines the ethical and problematic issues regarding assessment of information resource quality: "[I]n addition to

emphasizing 'regular' information literacy, such as how to effectively and ethically integrate outside sources into one's own work, our courses focus on how to evaluate the rhetorical and historical contexts of information." Faculty interested in developing a new goal strand course for University Seminar are required to identify how the course supports information literacy.

In consultation with program faculty, library faculty developed and maintain online research guides (LibGuides) for every program at SOU. LibGuides have also been created for individual courses in the following programs: Business, Criminology & Criminal Justice, Education, English & Writing, and Political Science. Program faculty frequently direct their students to meet with their subject librarian as appropriate. Library faculty teach individual and multiple sessions for many courses, and in the case of the Chemistry Capstone research sequence, library faculty co-teach with program faculty. Over the past five years, library faculty have taught an average of more than 200 individual research classes for more than 4,000 students per year. In the 2014–15 academic year, library faculty taught 240 classes for 4,592 students. As many as 96 of those classes (for 1,554 students) were upper division or graduate-level. In 2014–15, eighty classes (for 1,467 students) were taught for first-year University Seminar or lower division courses. In addition, library faculty provided 227 one-on-one individual instructional consultations and 716 email and phone consultations in the 2014–15 academic year.

Through course and assignment design, curricular development, library instruction, and information resource development and organization, library and information sources are thoroughly integrated into the learning process at SOU.

2.C.7 **Credit for prior experiential learning, if granted, is: a) guided by approved policies and procedures; b) awarded only at the undergraduate level to enrolled students; c) limited to a maximum of 25% of the credits needed for a degree; d) awarded only for documented student achievement equivalent to expected learning achievement for courses within the institution's regular curricular offerings; and e) granted only upon the recommendation of appropriately qualified teaching faculty. Credit granted for prior experiential learning is so identified on students' transcripts and may not duplicate other credit awarded to the student in fulfillment of degree requirements. The institution makes no assurances regarding the number of credits to be awarded prior to the completion of the institution's review process.**

In response to NWCCU's evaluation of SOU's Year Three Peer Evaluation Report submitted in fall 2013, SOU's finalized policy on Credit for Experiential Learning (CPL) was submitted for approval by NWCCU in 2015. As stated in NWCCU correspondence of February 6, 2014:

> Southern Oregon University has not yet finalized its policy on Credit for Prior Experiential Learning in conjunction with the Oregon University System and must do so to be compliant with NWCCU standards for Accreditation.

In 2014, SOU was preparing to introduce the Bachelor of Science in Innovation & Leadership (INL), to which our Credit for Prior & Experiential Learning Policy [Exhibit 2.C.6 Credit for Prior

Learning] currently applies. Our intent has been to phase in a CPL policy for the Institution in stages, starting with a policy that would directly address the needs and attributes of students in the INL Program. INL offers a cohort-based, intensive baccalaureate opportunity to students who hold college credit and are seeking to complete degrees after at least five years of work experience. The degree is suitable for a wide range of students but is directly geared toward adult students currently working in a career in which degree completion is required or encouraged.

INL requires 90 credits of lower and upper division general education coursework; 30 credits of lower division support coursework; and a professional development upper division sequence of 60 credits. Learning goals and outcomes focus on four primary disciplinary areas: business, communication, digital media, and information science. Knowledge, skill, and dispositional outcomes focus on collaboration, critical and creative thinking, emotional intelligence, organizational capacity, critical analysis of information, and innovative and sustainable leadership. It is an intensive program that meets year-round, and its scheduling adheres to a professional rather than academic calendar. Each of the required courses is taught for a five-week session, and the entire sequence takes 21 months to complete.

INL was approved in February 2014 at the OUS Provosts Council. The first cohort of 19 students entered the program in January 2015 and completed the program in summer 2016. Cohort 2 will begin in August 2015 and will complete its course sequence in spring 2017.

SOU's Credit for Prior Learning policy meets all criteria stipulated by NWCCU as stated in Standard 2.C.7. As of 2016, CPL is available to INL students only, but it will be expanded to address the needs of additional students, first in selected programs (scheduled for AY 2016–17) and then for the entire campus (scheduled for AY 2017–18).

2.C.8 **The final judgment in accepting transfer credit is the responsibility of the receiving institution. Transfer credit is accepted according to procedures that provide adequate safeguards to ensure high academic quality, relevance to the students' programs, and integrity of the receiving institution's degrees. In accepting transfer credit, the receiving institution ensures that the credit accepted is appropriate for its programs and comparable in nature, content, academic quality, and level to credit it offers. Where patterns of student enrollment between institutions are identified, the institution develops articulation agreements between the institutions.**

SOU's formal transfer of credit process is clearly stated in the Catalog. This policy addresses transfer of credit from accredited institutions, non-regionally accredited institutions, two-year institutions, and special credit scenarios such as the College Level Examination Program (CLEP), Advanced Placement (AP), and International Baccalaureate (IB). Specific course equivalencies, transfer guides, and articulation agreements are made available on the SOU Admissions website. Both of these resources are openly available to all students, whether current or prospective.

**Transfer credit is accepted from the following sources:**

- "Transfer-level" coursework from regionally accredited associate, baccalaureate, and master's (and higher) degree-granting institutions.

- Nationally recognized exams, including Advanced Placement (AP), College Level Examination Program (CLEP), and International Baccalaureate (IB). Passing exam scores and corresponding credit are set by the Oregon University System Chancellor's Office and SOU faculty and are published on SOU's website.

- Military Credit from Army, Navy, and Marines (AARTS and SMART transcripts). Credit is granted in accordance with American Council on Education (ACE) guidelines.

- Credit from foreign colleges and universities, based on evaluation by the Office of International Programs, under the direction of tenured faculty.

## Elective Credit

The vast majority of transfer credit comes from regionally accredited, domestic degree granting institutions. The SOU Office of the University Registrar accepts all such credit as "elective" if the transcript key designates it as "transfer level." Upper/lower division transfer credit is also determined by the course numbering system defined on the transcript key. If the course level is not clear, SOU evaluators contact the school for clarification. SOU faculty may substitute elective transfer credit into student degree programs on a case by case basis.

## Direct Equivalency

The Office of the University Registrar equates certain transfer courses with hard-numbered SOU courses based on faculty permission and guidelines (primarily for lower division). These equivalencies are monitored by faculty in SOU's articulation tables.

## University Studies (General Education Core Curriculum)

The Office of the University Registrar designates certain lower division courses as University Studies (Gen Ed Core) by comparing and matching each transfer course description with designated University Studies outcomes.

University Studies faculty and professional advisors monitor equivalencies in SOU's articulation tables. Registrar's Office staff members receive regular training to ensure their evaluations remain accurate and consistent.

## Articulation Agreements

SOU has identified enrollment patterns in several areas, leading to approximately 50 formal articulation agreements.

- Students who follow these agreements satisfy lower division University Studies requirements as well as prerequisites for selected majors. Each agreement was negotiated by faculty and is reviewed annually.

**Additional tools used for transfer credit evaluation:**

- SOU subscribes to the CollegeSource Transfer Evaluation System (TES), a database of millions of nationwide catalog course descriptions from the mid-1990s to present. TES includes a workflow tool to engage SOU faculty in the evaluation process and archive their equivalency decisions.

- SOU consults web articulation tables of peer institutions to see how others accept certain courses for transfer.

- SOU uses an equivalency petition form so students may directly petition faculty to review their elective transfer credit for value-added equivalency. Successful petitions are recorded on student records, added to articulation tables, entered into DegreeWorks, and archived.

- Whenever a transfer course is unclear, SOU evaluation staff email course descriptions to faculty for review. For difficult-to-assess courses, staff also obtain transfer course syllabi for faculty.

**SOU follows best practices as defined by a number of professional organizations, including:**

- American Association of Collegiate Registrars & Admissions Officers (AACRAO)
- Western Interstate Commission for Higher Education (WICHE)
- American Council on Education (ACE)

2.C.9 **The General Education component of undergraduate programs (if offered) demonstrates an integrated course of study that helps students develop the breadth and depth of intellect to become more effective learners and to prepare them for a productive life of work, citizenship, and personal fulfillment. Baccalaureate degree programs and transfer associate degree programs include a recognizable core of general education that represents an integration of basic knowledge and methodology of the humanities and fine arts, mathematical and natural sciences, and social sciences. Applied undergraduate degree and certificate programs of 30 semester credits or 45 quarter credits in length contain a recognizable core of related instruction or general education with identified outcomes in the areas of communication, computation, and human relations that align with and support program goals or intended outcomes.**

Three components and 10 strands form SOU's general education curriculum known as University Studies. The three components are:

1. Foundations (Strands A–D)
2. Explorations (Strands E–G)

3. Integrations (Strands H–J)

Students complete one class for each strand, with the exception of the Explorations sequence (E, F, G), for which students complete three classes or a certain number of credit hours (if a transfer student). Foundational sequence (Strands A, B, C, D) and Explorations sequence classes are lower division (100- and 200-level), and Integration classes (Strands H, I, and J) are upper division (300- and 400-level). The overall scheme of the University Studies curriculum provides both breadth (Foundations/Explorations) and depth (Integration). In addition, the foundational goals of communication, critical thinking, informational literacy (completed as part of University Seminar or House Seminar first-year experience), and quantitative reasoning (Strands A–D)—or their equivalents for transfer students—are required of all students. Courses approved for University Studies are listed on the University Studies web page, identified in both the online Catalog and Class Schedule, and outlined in advising materials provided by individual programs and professional advising staff in Academic Support Programs. The DegreeWorks advising software implemented in 2015 also organizes and assesses students' advising plans by University Studies strand, clearly identifying completed and remaining required courses.

The University Studies strands are:

- Strand A – Communication
- Strand B – Critical Thinking
- Strand C – Information Literacy
- Strand D – Quantitative Reasoning
- Strand E – Arts & Humanities
- Strand F – Social Science
- Strand G – Sciences (Biological, Physical, Computer)
- Strand H – Science, Technology, & Society
- Strand I – Citizenship & Social Responsibility
- Strand J – Diversity & Global Awareness

**_Lower Division Foundational Goals (16)_**

| USEM/HSEM 101 | Strand A (4) * |
|---------------|----------------|
| USEM/HSEM 102 | Strand B (4) * |
| USEM/HSEM 103 | Strand C (4) * |

| Quantitative Reasoning | Strand D (4) |
| --- | --- |

*Strands integrated across three-course first-year experience University Seminar USEM or House Seminar (HSEM)*

### Explorations Courses (36)

| Humanities (Arts & Sciences) | Strand E (12) |
| --- | --- |
| Social Sciences | Strand F (12) |
| Sciences (2 with labs and one non-lab) | Strand G (12) |

### Upper Division Integrations (12)

| Science, Technology, & Society | Strand H (4) |
| --- | --- |
| Civic Engagement | Strand I (4) |
| Diversity & Global Awareness | Strand J (4) |

In fall 2013, SOU introduced a second track for University Studies referred to as the House Experience. Houses were designed as multiyear, cohort-based experiential learning communities organized around specific themes that integrate core themes, conceptual learning, and real-life issues and problems. Houses were built on high-impact practices, offering a distinctive and challenging student experience that encourages resilience, adaptability, team skills, career awareness, and problem solving.

Complementing their traditional academic major, students participate in an interdisciplinary curricular structure comprising classes and other experiences centered on "big ideas" such as social justice (the Social Justice House), critical thinking (the Skeptic House), and environmental sustainability (the Green House). Faculty, students, and staff collaborate across traditional majors to create novel academic experiences that involve active learning, research, performance, adventure, career mentoring, and real-world application.

House students begin in the first-year House Seminar sequence, which initiates the "home-room" experience that evolves, over three years, to deliver foundational academic skills, academic advising, peer mentoring, group projects, lab/field work or performance, field trips,

career preparation, portfolio/resumé building, professional conference participation, and research publication. Houses include engagement courses (199, 299, 399) corresponding with 100-, 200-, and 300-level general education courses, and finally, capstone as the culminating experience. In 2013, two Houses (Green, Social Justice) were introduced, with the Skeptic and Green Houses added in 2014.

While initially popular with students, Houses proved somewhat less successful than anticipated, and two of the original four houses have been suspended. Students either integrated into a different House or stepped into the conventional University Studies structure for the remainder of their time at SOU. Issues that arose included scheduling challenges involved in coursework with a significant community engagement component—experienced by both students and faculty. Additionally, the faculty loading for Houses is significant, and some contributing programs struggled to backfill courses taught by faculty involved in the House experience. As of 2016–17, the Green and Skeptic Houses remain on track to graduate students in spring 2017 and spring 2018, respectively, while the Mind-Body and Social Justice houses have been suspended.

The Honors College at SOU offers its own integrated curriculum that partially meets University Studies requirements (50 credits) and consists of:

Foundations (HON 101, 102, 103): 12 credits

Probability & Statistics (HON 243): 4 credits

**Honors Seminars**

Three 1-credit sophomore seminars (Modes of Argumentation)

HON 250 Logic & Line or Argumentation

HON 251 Fallacies in Arguments

HON 252 Varieties of Reasoning

Three 1-credit junior seminars (Modes of Research)

HON 350 Qualitative & Historical

HON 351 Descriptive & Correlative

HON 352 Experimental

Biography: Historical & Contemporary Figures (HON 301): 4 credits

Any five courses of approved upper division topics courses: 20 credits

HON 315 Art, Culture, & Humanities

HON 317 Politics, Institutions, & Society

HON 319 Science, Sustainability, & Nature

Final project (HON 490): 4 credits

Total: 50 credits

All University Studies curriculum is subject to approval through the customary curricular review process as well as by the University Studies Committee. USC is responsible for overseeing the institution, maintenance, and development of the University Studies curriculum. The committee comprises seven faculty members, while the director of undergraduate studies; associate provost; one student; and representatives of Academic Support Programs, Enrollment Services, and Admissions serve as ex officio members. The committee's charge is to:

- Review and recommend modifications as needed to the general education program, including the associated goals and proficiencies.
- Develop and maintain criteria for courses meeting specific goals.
- Review and recommend new courses that will meet University Studies criteria to Faculty Senate through the Undergraduate Curriculum Committee.
- Develop and maintain a systematic process for reviewing existing courses approved for University Studies at least once every five years to ensure they continue to meet current criteria.
- Recommend policy changes or additions needed to support general education at Southern Oregon University.
- Assist faculty or staff responsible for evaluating transfer courses.
- Work with the Institutional Assessment Committee regarding the effectiveness of the general education component of SOU's undergraduate program.

Courses gain approval for University Studies designation through a review and approval process guided by the committee. Revision of the template for course adoption policy and procedures was initiated during winter term 2016 and will take effect AY 2016–17 for applications seeking approval through the committee. The application must identify at least one of the goals for the strand as a "primary" focus and specify which other goals for the strand are "addressed." Addressed goals introduce students to proficiencies but receive less emphasis than primary goals. Foundational strands should be addressed in all University Studies courses.

For each goal or proficiency, the application must explain what students will do to demonstrate understanding or mastery of the knowledge and proficiencies associated with each strand (or core theme). Assignments that will be used to assess the students' proficiency must be described, and one example assignment must be included as well as a condensed

syllabus and full syllabus. The application form for each strand is posted on the [University Studies website](#).

2.C.11 **The related instruction components of applied degree and certificate programs (if offered) have identifiable and assessable learning outcomes that align with and support program goals or intended outcomes. Related instruction components may be embedded within program curricula or taught in blocks of specialized instruction, but each approach must have clearly identified content and be taught or monitored by teaching faculty who are appropriately qualified in those areas**

Southern Oregon University does not offer associate of arts (AA) or associate of science (AS) degrees. Nor does SOU offer an associate of applied sciences (AAS) degree. SOU offers a [bachelor of applied science (BAS)](#) in management to students who transfer into SOU with an associate of science in an appropriate area. The BAS is offered in two specialized tracks: the General Management Option and the Hospitality and Tourism Option. Program "worksheets" for both options are posted on the BAS web page, along with Catalog requirements, minimum grade requirements, and other advising materials. All courses offered as part of the BAS are taught by program faculty with appropriate credentials.

All undergraduate certificate programs are concurrent programs, and students cannot enroll at SOU solely to complete a "standalone" undergraduate certificate. Certificates are awarded within major programs or degrees and have clearly articulated learning outcomes. New programs must articulate their learning outcomes, submit a proposal for approval of new curriculum, and adhere to standards and expectations required for all new curriculum to be approved. Certificates must be approved by the Curriculum Committee before they can be recommended to Faculty Senate, SOU's Board of Trustees, Provosts Council, and HECC for final approval.

Students may be granted a certificate, concurrently or consecutively to a bachelor's degree, but a certificate may not be awarded prior to a bachelor's degree. A certificate normally consists of 26 to 36 credits focused on providing students with a specialized focus and set of skills. Certificates typically require a minimum of 20 credits of upper division coursework in addition to any lower division courses necessary as a foundation for the upper division part of the certificate.

The total requirements for a certificate depend on the structure of the academic discipline, prerequisites for required courses, and student's starting level in the discipline.

Courses used for a certificate may also be used to satisfy the University Studies requirements.

Students must complete 20 of the final credits of a certificate while in residence at SOU.

Students contemplating a certificate should carefully study the list of required courses and prerequisites and then consult an advisor in the academic unit with jurisdiction over the

certificate. This advisor must approve the program for the certificate and completion of course requirements with a minimum 2.0 GPA. Some certificates may require a higher GPA; these are identified in the Catalog for each individual program.

A certificate is not required for subject matter degree programs. Students must submit an Application for Degree to have the certificate(s) awarded. If a certificate will be earned alongside a degree, students must list their certificate(s) on their Application for Degree to have the certificate(s) awarded with their degree. Awarded certificates are entered on transcripts, and students are provided with official certificates. Students pursuing a certificate but not concurrently seeking a degree are not eligible for financial aid. If a student is pursuing a certificate concurrently with a degree, the certificate will be awarded at the same time as the degree.

As certificates become more popular among students, a specific section of the academic Catalog may be dedicated to certificates, providing information that generally pertains to all certificates. It is expected this matter will be addressed by the Academic Policies Committee and taken to Faculty Senate for approval before the end of academic year 2015–16.

2.C.12 **Graduate programs are consistent with the institution's mission; are in keeping with the expectations of their respective disciplines and professions; and are described through nomenclature that is appropriate to the levels of graduate and professional degrees offered. They differ from undergraduate programs by requiring greater depth of study and increased demands on student intellectual or creative capacities; knowledge of the literature of the field; and ongoing student engagement in research, scholarship, creative expression, and/or appropriate high-level professional practice.**

Oversight of graduate-level program design, policies, curricula, procedures, and related operations is provided by the SOU Graduate Council (GC) under the auspices of the University's Faculty Senate and the Provost's Office. All new, revised, or reinstated graduate programs are required to present to the Graduate Council their learning objectives and their measures of learning and to explain how the objectives and measures differ from those of undergraduate programs in the discipline.

Graduate Council's voting members are faculty who teach and advise in graduate programs. The director of graduate studies and coordinators of graduate programs serve as ex officio, nonvoting members. In 2016, a proposal to increase the membership on Graduate Council from six to seven voting faculty members was approved by Faculty Senate.

Working with the graduate program specialist, program coordinators, and director of graduate studies, Graduate Council examines and makes recommendations on policies for requirements for admission to the Graduate Studies Program, minimum grade requirements, credit hour restrictions and graduate faculty. The GC does not make policies governing graduate certificates or licenses.

At the program level, graduate faculty work with their colleagues; program chairs or coordinators; and directors to design all aspects of a graduate program, including entrance requirements, expectations for satisfactory progress, and exit requirements. The program regulations and procedures that have been established for the University by the GC include the following minimum standards for graduation in all programs.

1. Specified time period for degree completion: University requirements state that all credits earned in the SOU program of graduate study must be no more than seven years old at the time a degree is completed; upon program completion, courses taken prior to 10 years earlier must be replaced. There is no maximum course load for graduate students (newly adopted in AY 2015–16).

2. Number of credits completed in residency: Students must earn a minimum of 30 credits toward the master's degree while in residence. The last 9 credits of the program must be in residence unless a waiver is approved by the graduate program coordinator and appropriate division director.

4. Number of graduate-level credits required: Under University rules, only 500-level courses count toward a master's degree at SOU. Courses numbered 500 are for graduate students only unless a special exception applies for an undergraduate student; courses numbered 400/500 are offered concomitantly for seniors and graduate students in a major.

5. Number of credits required to complete the degree: A minimum of 36 credits is required to complete a master's degree. Several of SOU's graduate programs require a mid-program evaluation as soon as possible after completion of 18 credits and no later than the completion of 24 credits. This is intended to guarantee all credits taken by a student count toward program completion. Most graduate programs have a minimum requirement of at least 36 (quarter) credits to complete the degree, licensure, or certificate.

6. No more than 21 credits of open-numbered courses may be included in a 45-credit program. Open-numbered courses include the following: 501, 504, 505, 506, 507, 508, 509, and 510 Special Topics; they do not have a Catalog description. Thesis (503) is not considered an open-numbered course.

7. Minimum standard of graded performance of B or better must be maintained: Students must earn a B- or higher in graduate-level courses for them to apply as program requirements. Individual programs may require higher or additional grading stipulations provided they comply with the University's minimum.

8. Qualifying and exit examinations: Several SOU graduate programs require both a mid-program and a final evaluation of candidates by the graduate faculty advisor or supervising committee. All students in a master's degree program must submit a final culminating experience comprehensive examination covering the required work for the degree. The type of examination differs depending on the program and major; it may be written, oral, or both. In some cases, the comprehensive examination is based on a

focused bibliography that supports the project or thesis and is accomplished before completing the research activity or thesis.

9. Proficiency requirements the candidate must satisfy: Proficiency requirements a candidate must satisfy are stated in the Catalog description of individual graduate programs. There are no specific references to proficiency requirements for graduate studies or any specific graduate program.

10. Thesis, research, and writing requirements: In most master's degree programs, students may elect to complete a thesis or project option to fulfill graduation requirements. Any student who wishes to explore a thesis or project option should check with the graduate coordinator at the beginning of the program for information about the special procedures and regulations governing such an option.

In most programs, the student's thesis or project committee must meet and approve the project proposal. This approved proposal must be on file with the graduate program coordinator before the irregular registration forms for thesis or project coursework are approved.

Students may use 6 to 12 credits, with a maximum of 3 credits from the support area, for the thesis or project. Those exercising this option must follow the format required by their programs. Students defend the thesis or project in an oral examination if required by their program.

Descriptions of specific graduate programs, including admissions policies and requirements, are available in centralized locations such as the [University Catalog](), [Graduate Studies website](), and respective graduate program websites. However, some information must be obtained directly from a graduate coordinator of a specific program. Previously, a graduate student's handbook contained this information as well. In an effort to streamline information resources and demarcate program requirements, admissions information, and Catalog copy from more general student resources and support functions, most Catalog and other requirements have been migrated to the Graduate Studies web page, where information can be updated in a more timely and responsive way. The current version of the Graduate Students Handbook has been revised to include information on student life, support, and University resources intended to enhance the student's success and experiences as a graduate student. The handbook will be presented at Graduate Council and to Faculty Senate for approval in fall 2016.

Graduate programs have taken longer to integrate into the University's assessment reporting procedures than undergraduate and academic support programs. In most cases, this is due either to the faculty resources in most graduate programs or the graduate program's commitment to external accreditors. Programmatic data, including course assessment and evaluation information, are currently maintained by graduate program coordinators, who are also responsible for articulating and assessing a set of student learning outcomes and proficiencies. Each graduate program either has or is working on a process for developing learning outcomes and, for AY 2016–17, will be charged with entering these outcomes,

assessment plans, and results into TracDat. Upon completion, a subcommittee of Graduate Council, working with the director of university assessment and director of graduate studies, will evaluate assessment reports and provide feedback, as has been the case with undergraduate programs. As of 2016, 7 of 14 graduate programs have entered program data into TracDat.

SOU employs a 400/500 split-level course numbering scheme for courses that can be taken by either graduate or senior undergraduate-level students. Though graduate and undergraduate students may be asked to perform with equal competence in fundamental class work, the graduate 500-level student is required to complete significant research and reporting activity beyond the level required of the undergraduate students in class performance as well as any additional requirements articulated by the faculty member in consultation with the program chair, division directors, and/or director of graduate studies. Further, graduate students are required to complete their programs a culminating project, either in the form of a thesis, applied project and report, or comprehensive examination as well as presenting a defense of their final thesis or project. Often, graduate students will also be required to assume a more sustained leadership role in the discourse of ideas in a classroom setting and may engage directly in teaching-related activities with their undergraduate classmates. Program coordinators and representative faculty members are required to articulate the fundamental areas of distinction between undergraduate and graduate instruction in proposals for new courses and programs upon submission to Graduate Council, citing key differences in the amount and sophistication of material presented and learned as well as articulation for general expectations of graduate-level work. Graduate Council assesses curriculum against expectations for mastery of course material using advanced skills, the foregrounding of theoretical concepts in the graduate students' work, expectations for graduate-level research and writing, and the level of complexity graduate students are required to demonstrate in class participation and oral presentation. Historically, the role of the GC has been to point out some inconsistencies among departments' proposals regarding the mechanisms and criteria used to judge a student's progress—apart from the assigning of course grades. This is an important part of an ongoing evaluation of the quality of SOU's graduate programs.

Graduate programs are encouraged to establish a periodic self-evaluation of the measurement of criteria used to judge the learning outcomes of graduate students in their programs as well as to regularly engage the graduate faculty in a discourse about the criteria used to differentiate between knowledge bases and competencies for graduate and undergraduate students at SOU through graduate summits and graduate faculty surveys.

Since 2014, graduate programs have been supported by a full-time graduate program specialist, who provides administrative support to the director of graduate studies, Graduate Council, and individual programs.

Since our last accreditation report, we have also made considerable progress in the consolidation and publication of descriptions, procedures, and policies for graduate studies at

SOU. Moreover, we continue to discuss the possibility of organizing a graduate student's admission process under the supervision of the director of graduate studies and the support of our graduate program specialist, who currently works closely with Admissions and other key staff to ensure students receive timely, comprehensive, and accurate information regarding their admission procedures. This work yielded a standardized template for admissions letters to graduate students, a centralized "one-stop shop" for potential and current graduate students, and additional resources provided on the Graduate Studies website.

**2.C.13 Graduate admission and retention policies ensure that student qualifications and expectations are compatible with the institution's mission and the program's requirements. Transfer of credit is evaluated according to clearly defined policies by faculty with a major commitment to graduate education or by a representative body of faculty responsible for the degree program at the receiving institution.**

Graduate admission policies and procedural regulations are consistent among the various levels of administration at SOU. Evaluation for general graduate admission is conducted by University Admissions personnel in consultation with the graduate coordinators. The requirements, procedures, and deadlines for application to a specific major area in graduate studies programs are articulated in the University Catalog and at the University graduate programs' websites. The admissions process may vary somewhat from program to program.

Students who do not meet admission standards at both the University and major program areas may be admitted conditionally by permission of the director of graduate studies in consultation with the graduate coordinator, division director, and program chair or coordinator. Such exceptions to normal admissions standards are made in rare instances, such as when a student's undergraduate GPA may be lower than the minimum requirement but the student can demonstrate through letters of recommendation (or some other form of evidence) that they have the potential to succeed in graduate-level coursework.

A student may include only 16 quarter credits of approved graduate coursework taken prior to regular admission to a master's degree program at the University. This limitation applies to coursework both taken at SOU and transferred from other institutions. Such courses must be appropriate for the master's degree program to which the student is admitted and must be approved by the major advisor and graduate program coordinator. All transfer credit must be supported by official transcripts sent directly from the school of origin to SOU Admissions. Acceptance of any transfer credit is the prerogative of the degree-granting institution, subject to approval of the appropriate designated graduate faculty, program chair or coordinator, and/or director of graduate studies.

As stated in 2.C.12 above, students must earn a minimum of 30 credits toward the master's degree while in residence. The last 9 credits of the program must be in residence, unless a waiver is approved by the graduate program coordinator and appropriate division director.

To be eligible to instruct graduate-level courses or evaluate graduate-level transfer credits, a faculty member must be approved as a graduate faculty member by the director of graduate studies and then reported to Graduate Council. Faculty may apply for designation in one of three categories: graduate faculty, associate graduate faculty, or adjunct graduate faculty. Forms and instructions for graduate faculty approval are available on the Graduate Studies website.

**2.C.14 Graduate credit may be granted for internships, field experiences, and clinical practices that are an integral part of the graduate degree program. Credit toward graduate degrees may not be granted for experiential learning that occurred prior to matriculation into the graduate degree program. Unless the institution structures the graduate learning experience, monitors that learning, and assesses learning achievements, graduate credit is not granted for learning experiences external to the students' formal graduate programs.**

Several of SOU's graduate programs incorporate workshops, internships, practica, and other types of experiential learning into their graduate degree offerings. These courses are often designated as "open-numbered" (e.g., 501 Research, 505 Reading & Conference, and 407 Seminar). Courses taught with these numbers do not usually have specific, permanent course content but change from term to term. Standard open-numbered courses have conventionally been identified at SOU as numbers below 511. Specific open numbers have also been created by programs. For example, 504 is used by the Clinical Mental Health Counseling Program for its individual counseling practicum and 506 for its group counseling practicum. Other numbers are also used to designate open-format classes; these numbers can be identified as marking a workshop, practicum, or internship course by the course's title or description.

Courses such as these fall under the "Workshop Credit and Practicum" and "Open-Numbered Graduate Courses" course exclusions of the Graduate Studies Program at SOU as stated in the Catalog and other electronic and print publications available to students. These regulations state, "[a] maximum of 9 hours of workshop or practicum credit may be included in a graduate program with advisor consent and no more than 21 credits of open-numbered courses may be included in a 45-credit program."

The number of hours spent by students in an experiential or open learning environment to earn credits toward degree completion varies from program to program. Graduate faculty advisors, graduate program planners, and practicum supervisors in each academic program determine the nature and form of experiential learning in their program or an individual's program.

Graduate faculty advisors monitor and assess the student's experiences in these kinds of classes and may rely on periodic observation of student performance, student work or learning goals journals, and field supervisor/employer evaluations, particularly in clinical settings. These practices need to be reviewed by the graduate coordinator for their rationale and consistency.

A student may not earn program credit in any graduate program for internship, field experience, or practica completed at another university or taken at SOU prior to matriculation into the graduate program.

**2.C.15 Graduate programs intended to prepare students for research, professional practice, scholarship, or artistic creation are characterized by a high level of expertise, originality, and critical analysis. Programs intended to prepare students for artistic creation are directed toward developing personal expressions of original concepts, interpretations, imagination, thoughts, or feelings. Graduate programs intended to prepare students for research or scholarship are directed toward advancing the frontiers of knowledge by constructing and/or revising theories and creating or applying knowledge. Graduate programs intended to prepare students for professional practice are directed toward developing high levels of knowledge and performance skills directly related to effective practice within the profession.**

SOU offers several categories of graduate programs, including master's degree in interdisciplinary studies, specialized master's degrees and licensing programs, and professional master's degree programs. They are:

- master in business administration (MBA)
- master of arts (MA) or science (MS) in education
- master of science in environmental education
- master in interdisciplinary studies
- master of arts in French language teaching
- master in clinical mental health counseling
- master of music in performance
- master of arts in Spanish language teaching
- master of arts in teaching
- master of theatre studies in production and design

For students whose interests or disciplinary engagement span more than one disciplinary area, SOU offers a master in interdisciplinary studies. This program serves graduate students who want to develop new perspectives on human values and questions of social importance; develop new habits of thinking; and advance their analytical and communication skills. The master in interdisciplinary studies is designed to combine the theory and practice of several strands or disciplines of inquiry originating in a variety of other academic areas, such as the social sciences, sciences, humanities, education, and business. The degree provides an opportunity for substantial academic preparation and advanced mastery in interrelated areas of study that have the power to stimulate multidimensional views of complex knowledge. Students in this program build multifaceted competencies, creative practices, and broadminded perspectives that may reach across a select range of discourses and experiences.

Most graduate degree programs at SOU lead to the master of arts or master of science degree or to licensure, preparing participants for professional advancement related to a specific field of inquiry. These programs consist of a strong subject matter preparation in a major area at the graduate level. The specific objectives of these master's degrees are to expose students to current information and practices in a career field and provide students with opportunities to develop high levels of skill and depth of knowledge that combine theory and experience in a field of study relevant to the demands of civic responsibility and professional life in a globalized and multicultural world.

The following master's degrees offered at SOU are designed for individuals pursuing professional advancement:

- business management
- business administration
- teaching and educational administration
- environmental education
- foreign language education
- music performance
- mental health counseling
- theatre studies in production and design

Two previously offered programs, applied mathematics and applied computer science, were suspended in AY 2015.

## 2.C.16 Credit and noncredit continuing education programs and other special programs are compatible with the institution's mission and goals.

Outreach & Engagement Programs (O&EP) derive from the University's mission and goals. Through semiannual program retreats and annual division reporting, the division sets division-specific goals based on University goals and assesses how well those goals have been met. Reporting directly to the provost, the executive director for outreach and engagement programs is involved in institutional strategic planning as well as participating in regional workforce development groups to ensure the University's continuing education programs serve regional needs while remaining aligned with institutional vision. These structures have led Outreach & Engagement Programs to be responsive to changes within and beyond SOU.

Following completion of a strategic plan for the Medford campus, Outreach & Engagement Programs worked with academic programs to launch a new Medford-based degree program built around the needs of regional employers. This program has proved strong and sustainable. O&EP subsequently launched a noncredit set of workshops that serves non-degree training needs and acts as a pipeline into the degree program. More recently, O&EP repeated this process with academic programs, exploring a health sciences degree program

with employers. Meanwhile our high school credit programs have responded to increasing regional and statewide interest and are now partnering with Oregon's K–12 online public school to introduce online early college credit options. As the Osher Lifelong Learning Institute nears its 25th year, it is exploring a deeper connection with academic programs through special class offerings and approval of some OLLI classes for credit. Outreach & Engagement Programs integrates evaluation and informed experimentation to adapt to changing intersections between University and community.

**2.C.17 The institution maintains direct and sole responsibility for the academic quality of all aspects of its continuing education and special learning programs and courses. Continuing education and/or special learning activities, programs, or courses offered for academic credit are approved by the appropriate institutional body, monitored through established procedures with clearly defined roles and responsibilities, and assessed with regard to student achievement. Faculty representing the disciplines and fields of work are appropriately involved in the planning and evaluation of the institution's continuing education and special learning activities.**

SOU is directly and solely responsible for the academic quality of all programs offered by the Division of Continuing Education (DCE). In most cases, the division selects, hires, trains, and oversees the instructors for its programs as well as oversees and assesses content, using both participant evaluation and objective assessments to identify what works well and what needs to be improved.

Where the division does not exercise this level of control over instruction, it retains responsibility for academic quality. In Advanced Southern Credit (early college credit), instructors are employees of regional high schools. The educational qualifications and background of each of these instructors are reviewed and approved by the relevant University academic programs before the class is approved for college credit; the academic program then ensures academic quality through one of three ways articulated within our Dual Credit Accreditation from the State of Oregon [Exhibit 2.C.17 Oregon Dual Credit Program Accreditation]. For the Ed2Go Program, which offers online noncredit courses, SOU again does not hire/train the instructor. However, the Division of Continuing Education has full control over which of these classes will be offered in association with and constantly evaluates offerings, excluding classes that are perceived to be unsatisfactory due to either/both content or instructor.

Following a restructuring in 2008, the Division of Continuing Education no longer offers credit programs. All credit programs are offered directly by SOU's academic departments. Continuing Education serves as an intermediary with external audiences—including, most significantly, regional high schools participating in the Advanced Southern Credit (early college credit) Program. In this role, SOU communicates requirements for credit programs to high school teachers, distributes paperwork detailing those requirements, and ensures that completed

paperwork is received by academic programs for review. This ensures all credit courses follow the same institutional processes for approval, monitoring, and assessment.

SOU faculty are involved in the University's continuing education activities. They serve on our Youth Programs Advisory Board and search committees when new Continuing Education staff are hired. Faculty teach in the Osher Lifelong Learning Program. Most importantly, faculty participate in the whole range of Youth Programs classes, from teaching classes to providing the formal Welcome to Campus for the multiple academic competitions held on campus.

**2.C.18 The granting of credit or Continuing Education Units (CEUs) for continuing education courses and special learning activities is: a) guided by generally accepted norms; b) based on institutional mission and policy; c) consistent across the institution, wherever offered and however delivered; d) appropriate to the objectives of the course; and e) determined by student achievement of identified learning outcomes.**

Responsibility for approving instructors, course content, and student achievement for credit-bearing courses is held specifically by SOU academic programs. Courses offered as continuing education follow the same processes as those offered within a degree program. The only difference for continuing education courses is that the Division of Continuing Education assists with collecting relevant information and providing it to the academic program; DCE does not make approval decisions.

SOU's Advanced Southern Credit (early college credit) Program is the main venue through which external audiences are served with credit courses. The division promotes the program to high school administration and teachers as well as to high school students. In consultation with SOU academic programs, DCE has developed and distributes handbooks to guide high school teachers and students through the ASC process. [Exhibit 2.C.18 ASC Instructor Faculty Handbook] and [Exhibit 2.C.18 ASC Parent-Student Handbook] DCE distributes and collects course approval forms, delivers them to the relevant academic program, and tracks progress on the approval process. Where there are any concerns about the proposed course, the division ensures that the high school instructor understands the program's concerns. Once a course is approved, DCE creates the class in Banner and processes enrollments. At no time are these classes approved outside of University standards and norms. Students in approved classes are held to the same standards as regular SOU students in learning outcomes, and periodic assessment of student work by the relevant academic programs confirms this expectation is met.

Noncredit programs follow Continuing Education standards for awarding continuing education units (CEUs). These processes are outlined in a Criteria & Guidelines for Continuing Education Units document [Exhibit 2.C.18 CEU Guidelines], which is provided to external organizations inquiring about CEUs. Noncredit courses must establish that they meet all eight criteria for a class to be eligible for continuing education units:

1. Ensure the learning environment and support service is appropriate to the continuing education or training goals and learning outcomes for each event.

2. Ensure each activity, course, or program is planned in response to an identified need of a target audience.

3. Provide SOU's Division of Continuing Education with a clear and concise written statement of the intended learning outcomes (performance objective or desired behavior enhancement) based on the identified needs for each continuing education and training activity, course, or program.

4. Provide qualified personnel for the supervision and instruction of each activity, course, or program.

5. Ensure the content and instructional methods are appropriate for the learning outcomes of each activity, course, or program and provide opportunities for learners to participate and receive feedback.

6. Have a system in place to identify learners who have met the requirements for satisfactory completion of a course or activity.

7. Establish formal processes or procedures during the activity, course, or program to assess achievement of the desired learning outcomes.

8. Provide for an evaluation process for each learning activity, course, or program.

**2.C.19 The institution maintains records which describe the number of courses and nature of learning provided through noncredit instruction.**

The Division of Continuing Education reports annually on successes and notes issues in programming as well as recording the number of courses and nature of learning provided in all of its noncredit programs. This annual report compares these figures to the previous year and identifies trends. This information helps prepare staff and administration for changes that may need to be made to the selection of courses offered by making trends and issues transparent to all involved.

## 2.D STUDENT SUPPORT RESOURCES

**2.D.1 Consistent with the nature of its educational programs and methods of delivery, the institution creates effective learning environments with appropriate programs and services to support student learning needs.**

Student success is paramount to the educational mission of Southern Oregon University. To facilitate this success, SOU has created extensive support programs to meet the learning, behavioral, and financial needs of students. These include Academic Support Programs, the Learning Commons, Student Life, Student Health & Wellness Center, SOU Athletics, Raider Recreation, University Housing, and various clubs, organizations, and resource centers.

In 2012, the Office of Student Support and Intervention (OSSI) was created as part of the integration of Academic & Student Affairs. SSI is currently staffed by two licensed clinical social workers (LCSWs), a licensed professional counselor (LPC), and a conduct officer. In 2015, an additional case manager was added to meet growing needs and ensure compliance with best practices in higher education for student support. OSSI also houses SOU's confidential advisor, a member of the University's Title IX team who is available to survivors of sexual assault or misconduct, or those who know a survivor, to answer questions, provide information, and help navigate the options available at SOU as well as in the community. Confidential Advising at SOU is part of the University's Campus Choice Program, SOU's approach to addressing sexual assault, domestic violence, dating violence, and stalking. SOU partners with the Ashland Police Department's You Have Options Program to offer guidance, options, and protections to survivors of sexual assault. Confidential Advising allows victims of sexual assault to seek assistance without the mandatory report requirement, thus securing choices and autonomy in the reporting, involvement of law enforcement, and safety.

The University has five Title IX officers. In 2016, the University's sexual harassment and misconduct policies were replaced by a comprehensive Equal Opportunity, Harassment, and Sexual Misconduct Policy [Exhibit 2.D.1 Title IX Misconduct Policy], which follows ATIXA guidelines for equity grievance and Title IX, adheres to national best practices, and integrates into SOU's unique Campus Choice Program. Campus Choice has been identified as an emerging best practice in higher education; has been highlighted by the Educational Advisory Board [Exhibit 2.D.1 EABs Sexual Misconduct Reporting]; and has resulted in national understanding that SOU and Campus Choice are leading the nation in equitable process and trauma-informed investigations. Reporting of sexual assault, sexual misconduct, harassment, stalking, domestic violence, and other Title IX violations is done using an online, anonymous reporting form administered via Qualtrics survey software.

SOUCares is the University's online student support and intervention reporting system. SOUCares reports inform the Office of Student Support & Intervention and Student Support Network (SSN) by identifying students who may benefit from extra resources, support, or intervention. Faculty, staff, and students use SOUCares when intervention is required or to report a concern. SOUCares reports such areas of concern as:

- mental health or emotional issues
- academic performance
- family concern
- relationship issues
- personal illness or injury
- alcohol or other drug use
- academic integrity
- distressing, disruptive, or threatening behavior

- hate and/or bias-related incident
- crime victim

OSSI is one member of a Student Support Network, SOU's behavioral intervention team that comprises representation of each campus entity that provides support, assistance, resources, or direct intervention to students. Members are Student Support & Intervention, Student Life, Disability Resources, University Housing, Campus Public Safety, Student Health & Wellness Center, and Diversity & Inclusion/Title IX. SSN meets weekly to discuss student cases and collaboratively consider and apply strategies and interventions.

The Student Health & Wellness Center at SOU plays a vital role in ensuring the health, safety, and well-being of our campus community. This accredited ([Accreditation Association for Ambulatory Health Care](#)) and integrated (medical, mental health, and health promotion) center provides a range of health and educational services to maximize student health and academic success. The nursing and medical staff, in-house dispensary and lab, and mental health providers treat acute and chronic health conditions while maintaining close relationships with local providers and hospitals for timely referral. The SHWC treats everything from colds/flu to suicidality, chronic illness, relationship breakups, family planning, and PTSD. Its staff strive to provide services in an accessible, timely manner to minimize disruption to the student's academic responsibilities and support student retention. The SHWC works closely with other campus entities, including Student Support and Intervention, Disability Resources, Housing, Athletics, Veterans Support, Student Life, Campus Public Safety, Success at Southern, Academic Support Programs, and Enrollment Services. The SHWC also frequently works with faculty and academic administration to facilitate student well-being and academic success. SHWC staff work from a holistic, empowering, and developmental perspective and follow a two-fold guiding principle: a) to provide excellent clinical care while b) educating students to heighten their awareness and enhance responsibility-taking for their health, well-being, and success. SHWC is currently undergoing transition as it searches for a medical director to fill a staff vacancy created when the previous medical director left. As of fall 2016, the medical director's responsibilities are being shared by two codirectors—an MD and the director of counseling— while the search for a full-time replacement director continues.

[Academics Support Programs](#) encompasses several entities that provide support for SOU students. Academic Support Programs has five full-time professional advisors who guide students through degree planning to ensure they achieve their academic goals. Four of these advisors work with the student populations found at the Ashland campus; three serve the Academic Support Programs general population; and one is dedicated to first-year [Bridge Program](#) students and those who matriculate into SOU through the [Jackson/Josephine County Pledge](#) Program. One full-time advisor works at the Higher Education Center in Medford.

Disability Resources Services (DRS) is also found in Academic Support Programs. DRS ensures students have access to the accommodations they need to be successful in the classroom and helps ensure SOU's compliance with ADA requirements. DRS also houses the University

Coaching & Academic Mentoring Program (U-CAM), a comprehensive, fee-for-services support program for students experiencing academic challenges. Designed for students with executive function challenges, ADD, and other learning disabilities, U-CAM promotes self-advocacy, autonomy, and academic achievement. The coaches for the U-CAM program promote self- advocacy, autonomy, and academic achievement for our students who have documented learning disabilities and need extra support and guidance by meeting with these students on a regular basis.

Two grant-funded programs have also been housed under Academic Support Programs: a federally-funded TRiO Student Support Services program entitled Success at Southern, which is ongoing, and the First Year Mentor Program. Success at Southern serves first-generation and low-income students as well as those with documented disabilities who have an academic need. The First Year Mentor Program began as an AmeriCorps position, which funded a first-year mentor coordinator to facilitate a peer mentorship program that aids our first-year students in their transition to college life. In 2012–13, at the end of the yearlong AmericaCorps grant, the position was made permanent and moved to Student Life; the First Year Mentor Program was then established as an ongoing service for incoming students.

TRiO funds also support the Ronald E. McNair Post-Baccalaureate Achievement Program, which develops skills in first-generation and low-income individuals or students from groups traditionally underrepresented in graduate education to aid with their application to and success in PhD programs. SOU's McNair Program has consistently met its performance objectives for participation in scholarly activities, graduate school enrollment, and continued enrollment in graduate study. For the 2012–16 grant cycle, 70% of the program's bachelor's degree recipients had enrolled in a graduate program. Twenty-seven students were served during the 2015 academic year, and five students had completed their PhDs within 10 years of earning their bachelor's degree. It should be noted that the program goal of 5% of program participants attaining their doctoral degree within 10 years of completing the undergraduate degree was not met, but the overall PhD completion reported by the end of the 2015 exceeds those objectives.

The SOU Learning Commons is located in the Hannon Library and provides several beneficial academic support programs. The Math & Science Tutoring Lab and Writing Center can be found in the Learning Commons, in addition to the Career Connections Office, study spaces, and technology labs and support. In 2015–16, 517 students were served in the Learning Commons Writing Center, and 408 students were served in the Math & Science Lab. Both centers saw increased student visits from 2014–15 to 2015–16: the Writing Center received 1,589 visits in 2015–16, and the Math & Science Lab saw 2,646 visits. The Learning Commons hosts the Long Night Against Procrastination, late-night events held during Finals Week that provide late-night homework and research help, including tutoring, for SOU students. Tutors are available for an extra three hours on the nights of the events. Two events were held (winter and spring quarter) in 2014–15; and three events (fall, winter, spring) in 2015–16. The Learning Commons also provides peer training for student tutors. Students at the Higher Education

Center also have access to the Learning Commons math tutoring on the Medford campus for a fee of $15/term.

The Learning Commons uses TutorTrac software to gauge student demand, ensure adequate staffing, and gather feedback from students.

Between 2011 and 2015, the LC 199 course was also coordinated through the Learning Commons. LC 199 was a 1-credit class providing students with success-building skills through topics like goal setting, time management, and executive function. The course was discontinued in 2015.

[Career Connections](#) is also located in the Learning Commons. Career Connections provides a range of services to help students and faculty find ways to apply classroom experiences to the working world. Resources for students, faculty, and prospective employers include links to jobs and internships through the CareerLink system, which allows students to register an online profile and search for opportunities. The FOCUS 2 online career and education planning system is a self-paced career guidance tool designed to help students select the right major, clarify their career goals, and provide them with valuable occupation information. The office assists students with writing resumés and cover letters as well as teaching them interviewing skills. Since AY 2013–14, Career Connections has coordinated the [PEAK Jobs Program](#). PEAK (Professional Experience, Achievement, and Knowledge) jobs are student employment opportunities designed to help students hone application skills; connect with faculty, staff, and other students; and provide the opportunity to develop and use professional skills. PEAK jobs are designed with specific learning outcomes and supervision that map directly to the discipline or program. Students may work between 8 and 20 hours per week in PEAK jobs, and the sponsoring program is required to contribute 25% of the student's salary, with the remaining 75% provided out of University general funds.

[SOU Athletics](#)' mission statement is to emphasize the educational principles inherent in sport and competition and put a premium on the social growth and ethical engagement of the University's student-athletes. Careful attention is paid to the academic engagement of the student-athletes to ensure their eligibility to play their sport while simultaneously achieving academic success. Coaches expect student-athletes to communicate with faculty about assignments, tests, and attendance that might be impacted by competing away. Class attendance is stressed, and at the midterm, coaches send out progress reports to faculty of the students participating in the sport. In AY 2015–16, Athletics worked with the Academic Policies Committee to finalize absence policies for postseason travel in an effort to further safeguard student-athletes' academic success.

Southern Oregon University also has five campus [Resource Centers](#) to support students who are traditionally underrepresented or marginalized within higher education. The [Multicultural Resource Center](#) (MRC) facilitates campuswide diversity programming, leadership development for its student employees, and computer lab space with free printing. The Multicultural Resource Center also coordinates the Diversity Scholarship Program, which has ongoing grade

checks, success strategy workshops, and mentorship for its participants. Like the MRC, the Queer Resource Center (QRC) offers campuswide programming, leadership development, and a computer lab space. The QRC coordinator and student staff also conduct outreach, including classroom panels on LGBTQ issues. Due largely to the work of the QRC and its allied programs on campus, SOU has been voted one of the 30 most queer-friendly campuses in the US for the past four years by Campus Pride. The rating is based on seven assessment and evaluation focus areas: policy inclusion, academic life, student life, housing and residence life, campus safety, counseling and health, and recruitment and retention. Each spring, the QRC hosts Lavender Graduation for the University's LGBTQ students and offers special recognition to queer and allied students, staff, and faculty on campus.

Similar to the MRC and QRC, the Women's Resource Center (WRC) offers resources for responding to sexual assault victims and other violence as well as practicum opportunities so interested students can fulfill requirements of their major. The Commuter Resource Center (CRC) offers computer lab space, study hall programming, term paper delivery, and support for nonresidential or nontraditional students and their families. The Veteran's Resource Center assists our veteran students with their transition to Southern Oregon University through various resources. A task force for veterans and military connected students convened in 2015 to examine and proposal additional support and programming for our veteran and MCS student populations.

SOU's Outdoor Program (OP) is an inclusive community that fosters personal growth through experiential programming and professional development and promotes the spirit of adventure for all SOU students. It offers many avenues for education and learning as well as a progressive leadership development program. Students are able to take increasingly larger roles of responsibility and empowerment through programming that includes apprenticeship, trip instructorship, trip leadership, and program development. A trajectory of leadership is common to most of OP's programs, though it is primarily seen in its adventure program, climbing gym, and kayak clinics. Through apprenticeship, training, and employment, OP offers students a chance to learn and develop transferable skills applicable to jobs in any field. OP's programmatic outcomes include assessment of goals related to health and well-being, individual responsibility and empowerment, team-based communication and problem solving, physical skills, project-based learning, organization, and leadership.

The Raider Recreation Program is administered by Student Life. It offers programs that promote positive physical and mental health, including intramural and other cocurricular recreational and physical activities opportunities. Like Outdoor Programs, Raider Rec has a student staff who are not only tasked with managing the programs but also with leadership and programming roles, including identifying, proposing, and promoting events offered through the program. Students learn program coordination, logistics, risk management, and compliance-related details of programming student recreation as well as how to work collectively toward a common goal or mission. All of its programs keep students engaged in

healthy lifestyles that will help them succeed in academia and engage in positive and competitive social settings.

Raider Traditions are designed to enhance collective spirit and connection to SOU through programming that is student-centered, community-focused, and tied to the larger mission of Southern Oregon University. Tradition Weeks are held throughout the academic year. These are coordinated by campus partners and involve leaders from major student organizations, staff, faculty, and community. Together, this team creates a collaborative calendar of events infused with the Raider spirit and pride. The main goal is to bring the University's diverse student body together to participate in fun, educational, and vibrant activities. Tradition Weeks held at SOU include Beak Week, Homecoming, Raider Winterfest, and Raider Days.

**2.D.2 The institution makes adequate provision for the safety and security of its students and their property at all locations where it offers programs and services. Crime statistics, campus security policies, and other disclosures required under federal and state regulations are made available in accordance with those regulations.**

Southern Oregon University provides safety and security for its students and their property through Campus Public Safety. The University also publishes and distributes crime statistics and campus security policies as required under 34 CFR 668.46 (implementation of the Jeanne Clery Act). This lists security awareness and crime prevention programs; emergency contact phone numbers for the University and community; the drug, alcohol, and weapons policies; and SOU Alert/Emergency Notifications information and directions.

The Campus Public Safety Brochure includes the Campus Crime Reporting and Crime Statistics. Prospective students and employees are able to access this report online at the SOU website by accessing the Campus Public Safety website. Southern Oregon University annually reports crime statistics online to the US Department of Education and publishes the information online for access by the University community and the public. An Emergency Response Handbook [Exhibit 2.D.2 Emergency Response Handbook] is updated annually and is also made available online to all Southern Oregon University constituents.

Campus Public Safety is responsible for maintaining the security of the campus in Ashland. Professional campus public safety officers and student agents patrol the campus 24 hours a day, seven days a week. Their responsibilities include:

1. Patrolling all grounds and buildings.
2. Enforcing parking and traffic rules.
3. Investigating suspicious activities.
4. Responding to emergencies.
5. Providing on-campus safety escort service by calling 541-552-6911.

Campus public safety officers are trained in first-aid and CPR. All campus public safety officers have completed requirements as established by the State of Oregon Department of Public Safety Standards & Training and are authorized by Oregon Statute to effect arrests if they observe crimes on the SOU campus. The director of CPS is a member of the Student Support Network.

2.D.3 **Consistent with its mission, core themes, and characteristics, the institution recruits and admits students with the potential to benefit from its educational offerings. It orients students to ensure they understand the requirements related to their programs of study and receive timely, useful, and accurate information and advising about relevant academic requirements, including graduation and transfer policies.**

SOU's Office of Admissions oversees the admission and recruiting processes. Admission criteria are published in several locations, including the Admissions website and printed and electronic resources provided during recruiting events. Admissions information is divided into distinct categories for specific prospective students: first-year, international students, transfer students, and graduate students. Printed and electronic versions of the SOU Viewbook provide information to students on campus life and resources, student academic support, housing, the local region, and cocurricular activities. [Exhibit 2.D.3 SOU Viewbook] The Viewbook also contains a basic institutional profile, key dates, and admissions requirements.

## Recruiting

Recruiting takes place both on and off campus via events and functions (Preview and Transfer Days), outreach to local and regional schools (SOU-to-You), and daily tours for individuals and groups provided by trained Raider Ambassador student workers. Tours are 75 minutes in length and include the Stevenson Union, academic buildings, residence halls, and dining facility. Admissions counselors are available to meet with prospective students and their families before and after the tours on a drop-in basis if they have additional questions. Appointments with faculty member or program chairs can be scheduled, as can requests to attend lectures or sit in on a class. Tour times, length, and information on self-guided tours are published online and can be scheduled electronically.

Preview Day/Preview Weekend Events are SOU's hallmark admissions opportunities. Students and their families are invited to campus to experience residential and dining facilities; meet faculty and program staff; attend discussion groups, special lectures, and interactive class sessions that highlight academic offerings; and participate in financial aid, financial literacy, and application workshops. Students may apply and be admitted on-site during Preview Events. Preview days are also scheduled for transfer students and provide specific pre-admissions information and resources for transfer students. Online sign-up is available for all Preview events. Program faculty and administrators participate by meeting with attendees, staffing the Enrollment Fair events that take place during Preview Weekends, and presenting special compressed lectures and courses to introduce academic content.

SOU also partners with local and regional schools and school districts for recruiting, pre-college, and transitional support; presenting Admissions-on-the-Spot opportunities; and bringing community partners to campus. These include:

- Reach Higher Shasta/College Options
- Pre-College Youth Program Support
- Academia Latina: a weeklong summer, pre-college academic experience for Hispanic students
- Athletics/Admissions presentations to area high schools
- Cesar E. Chavez Leadership Conference: a college preparation event for high school students of Latino/Hispanic descent nominated from 10 regional high schools
- Konaway Nika Tillikum: an eight-day academic camp program for Native American middle school students
- P2R and B2R (Pirates to Raiders and Bulldogs to Raiders): partnerships with local school districts that provide local middle school students with pre-college support, including academic and cultural preparation, admissions assistance, and financial aid. Students enroll in eighth grade.
- Local Raider Reception: receptions for newly admitted students from the immediate area
- Counselor Fly-In: a three-day orientation and admissions information event for counselors from Oregon, California, Hawaii, Idaho, and Washington
- Local United Way partnership
- Local high school admissions and academic symposia
- SOU's Pacific Northwest Association for College Admission Counseling (PNACAC) Fall Fair
- Oregon transfer days

Over the past few years, SOU has significantly enhanced efforts and programs to provide pathways to college, pre-college support, and admissions assistance for Native American and Hispanic students. In 2015, the Office of Admissions created a Native nations liaison position with a staff member dedicated to working with local First Nations communities. Similarly, a new full-time coordinator for minority outreach programs was hired in 2014. Admissions has also hired a full-time Portland admissions counselor.

In 2015–16, Southern Oregon University implemented a unique Bridge Program, providing:

- Leadership opportunities
- Enhanced academic advising and career connections
- Campus jobs
- Peer mentoring

- Academic tutoring support and academic credit
- A tuition-free intensive weeklong residential summer transitional program
- UGS 199 First Year Experience Seminar: a tuition-free 1-credit seminar designed around the students' assets, interests, needs, strengths, and lived experiences to support their academic and social success at SOU. This seminar is offered fall, winter, and spring quarter.

SOU's program is unique. Its yearlong duration and focus on providing support for students during their entire academic career connects students' strengths and experiences to learning outcomes, programs, resources, and opportunities and provides ongoing support to negotiate their transition into college life and beyond. Twenty students entered the program as its first cohort in 2015; the 2016 cohort expanded to more than 40 students. Plans to continue assessment and integrate Bridge data into other retention initiatives will be implemented beginning in fall 2016.

The Jackson/Josephine Pledge is an educational pathway for local high school students that helps students graduate in three years instead of four. Students receive individualized advising, coaching, mentoring, academic and student support from a Jackson/Josephine Pledge advisor, and a substantial tuition discount upon admission.

## Admissions and Orientation

The University assesses admissions applications using a holistic process that factors in academic performance and potential (GPA, SAT, and/or ACT scores) as well as other indicators of a student's suitability. Applicants who feel they fall below the University's admission standards or may not meet minimum requirements are encouraged to submit any or all of the following with their application for admission:

- letters of recommendation (from academic sources)
- writing sample
- resumé
- other supporting materials

Upon admission to the University, students receive the Admitted Student Booklet and instructions on next steps. [Exhibit 2.D.3 Admitted Student Booklet]

Students may apply for non-admit status. Students classified as non-admitted do not turn in official documents, and the application is free. However, there are limitations. This online chart provides more information.

Advanced Southern Credit (ASC) is a concurrent enrollment program administered by Southern Oregon University and highs schools in Oregon, California, and Nevada. ASC is a high-quality educational program that gives high school students the opportunity to enroll in

academically challenging coursework that enhances high school transcripts for University admission and, in many cases, saves students time and money in their academic future by allowing them to accumulate college credits before attending college. High schools offering ASC work with the University's academic programs to ensure rigor and suitability for advanced credit. An overview of Advanced Southern Credit is provided in the program brochure [Exhibit 2.D.3 College Credit for HS Students Brochure], which is distributed to high schools throughout the region. Schools participating in the program and courses approved for ASC are published on the ASC website and are continuously updated to ensure accuracy for students. Resources on transcripting, transfer of credits, program benefits, expectations, and enrollment processes are also provided at the ASC website and distributed to participating schools.

Upon admission, orientation activities are organized and presented by staff from Admissions and Academic Support Programs; academic program faculty; division directors; and University administrators.

The primary orientation event is ROAR (Raider Orientation And Registration), a day-and-a-half-long event offered to first-year students, including their families, during the summer before entry. ROAR includes advising, registration, and orientation to a wide range of University programs and services, such as Student Support & Intervention, Financial Aid, Student Life, TRiO programs, tutoring services, residential and dining facilities, campus resource centers and student clubs, and major and degree programs. Each student leaves the event having registered for fall term classes and with a designated advisor as each first-year University Seminar (USEM) class includes advising with a USEM faculty member. Some students will also be assigned a major advisor, depending on whether they have chosen a major or degree program.

Week of Welcome (WOW) continues the first-year student's orientation to SOU. WOW is a weeklong orientation to the University, including an introduction to University Housing, educational and social events, the SOU Loves Ashland tour of local businesses and attractions, community meetings, an on-campus job and internship fair, a leadership and clubs fair, a day of service, and Convocation. [Exhibit 2.D.3 Week of Welcome Schedule] and [Exhibit 2.D.3 Week of Welcome Checklist]

## Advising

In addition to the advising received during the new student orientation events required of all first-year students and University Seminar, students receive information about degree requirements and pathways to majors through advising materials distributed at Academic Support Programs and individual majors. SOU has also implemented DegreeWorks, which provide customized degree plans for students and advisors, including University Studies (general education) requirements, BA/BS requirements, and major requirements. DegreeWorks tracks courses completed and still required, GPA, prerequisites, and progress toward both

major completion and University Studies. DegreeWorks has been in testing and phased implementation since AY 2014–15 and will roll out to the entire campus in 2015–16. Additional funds have been allocated to support the full implementation of DegreeWorks, and training opportunities have been provided to all faculty.

2.D.4 **In the event of program elimination or significant change in requirements, the institution makes appropriate arrangements to ensure that students enrolled in the program have an opportunity to complete their program in a timely manner with a minimum of disruption.**

Within SOU's current Catalog under the section titled "Catalog Option," students may choose the catalog for an academic year, which includes the curriculum they will follow to finish their degree, provided it is within eight years of the year they entered the University. Accordingly, any students enrolled in programs eliminated by the University are guaranteed completion of their programs under that same catalog. In such situations, close collaboration occurs between the associated academic program and Registrar's Office to ensure degree completion and facilitate appropriate course substitutions as needed.

2.D.5 **The institution publishes in a catalog, or provides in a manner reasonably available to students and other stakeholders, current and accurate information that includes: a) institutional mission and core themes; b) entrance requirements and procedures; c) Grading policy; d) information on academic programs and courses, including degree and program completion requirements, expected learning outcomes, required course sequences, and projected timelines to completion based on normal student progress and frequency of course offerings; e) Names, titles, degrees held and conferring institutions for administrative and full-time faculty; f) Rules, regulations for conduct, rights and responsibilities; g)Tuition, feels, and other program costs; g) Refund policies and procedures for students who withdraw from enrollment; i) Opportunities and requirements for financial aid; and j) academic calendar.**

Southern Oregon University annually produces a Catalog that is available for general public use by any constituents via online access at catalog.sou.edu. The Catalog includes the following elements applicable to this accreditation standard: Institutional mission and core themes; entrance requirements and procedures; grading policy; information on academic programs and courses, including degree and program completion requirements, expected learning outcomes, required course sequences, and projected timelines to completion based on normal student progress and the frequency of course offerings; names, titles, degrees held, and conferring institutions for administrators and full-time faculty; and opportunities and requirements for financial aid. All of the aforementioned information is further delineated through a variety of additional publications and institutional website presence. Rules, regulations for conduct, rights, and responsibilities; tuition, fees, and other program costs; refund policies and procedures for students who withdraw from enrollment; and the academic

calendar are all easily accessible via the institutional website, as well as a variety of printed publications available in the Enrollment Services Center.

2.D.6 **Publications describing educational programs include accurate information on: a) National and/or state legal eligibility requirements for licensure or entry into an occupation or profession for which education and training are offered; b) Descriptions of the unique requirements for employment and advancement in the occupation or program.**

## Education

All candidates for Oregon teacher licensure and administrative licensure must meet standards from the Oregon Teacher Standards and Practices Commission (TSPC). In addition, all candidates for Oregon teacher licensure and administrative licensure must meet SOU admission and outcome requirements as well as some specific admission and outcome requirements that have been stipulated by SOU's School of Education. These requirements are published at the School of Education website.

The School of Education publishes licensure and degree requirement information for students in student handbooks (electronic and hard copy) and hard copy publications that are distributed to students at the start of their programs and as they complete their programs. Additionally, requirements are published in electronic course management sites that are unique to specific programs. [Exhibit 2.D.6 MAT 1 Year Program Handbook] and [Exhibit 2.D.6 MAT 2 Year Program Handbook]

## Clinical Mental Health Counseling

The Master in Clinical Mental Health Counseling (CMHC) Program is designed to meet all of the licensing requirements of Oregon State Board of Licensed Professional Counselors and Therapists (OBLPCT), allowing our students to become licensed professional counselors (LPCs). All 50 states and the federal government have some form of LPC license for which our graduates can qualify. The unique requirements for employment typically include licensure, and our program prepares students for licensure for every state in the country, so they can seek employment across the United States.

CMHC Program information can be found on the Psychology Program's website and in the SOU Catalog. The CMHC Program provides information about the program in printed materials distributed during orientation. The CMHC Program provides specific information about licensure in its graduate handbook. [Exhibit 2.D.6 MHC Grad Student Handbook]

2.D.7 **The institution adopts and adheres to policies and procedures regarding the secure retention of student records, including provision for reliable and retrievable backup of those records, regardless of their form. The institution publishes and follows established policies for confidentiality and release of student records.**

Southern Oregon University secures confidential student records in the Enrollment Services Center (ESC). Records for current and former students are maintained within Enrollment Services in a secured, locked, and alarmed room. The University regularly publishes information about, conducts training on, and enforces all Family Educational Rights Privacy Act (FERPA) regulations and requirements regarding the security of student records and information. The University registrar, who serves as custodian of student records and FERPA compliance officer, has developed an online FERPA training module that is used regularly, especially by new employees. The University has acquired a document imaging system and is in the process of developing protocols to securely digitize all student records.

**2.D.8 The institution provides an effective and accountable program of financial aid consistent with its mission, student needs, and institutional resources. Information regarding the categories of financial assistance (such as scholarships, grants, and loans) is published and made available to prospective and enrolled students.**

As stated on the Southern Oregon University Financial Aid online portal, the Enrollment Services Center administers student financial aid programs in compliance with applicable law, regulations, and policies that govern federal, state, institutional, and private funds. The ESC is committed to ensuring integrity, accuracy, and timeliness in the delivery of financial assistance to all students admitted to SOU. Communication is key to providing an effective and accountable program.

Located in the ESC, the SOU Financial Aid Office has many methods for communicating information about the various categories of financial aid offered at SOU. The [Financial Aid website](#) is the primary source of information. This page has the following sections:

- How to File the FAFSA
- Financial Aid Fact Sheet
- Financial Aid Checklist
- Description of the Financial Aid Process
    - Eligibility Requirements
    - Application Procedures
    - How Funds Are Awarded
    - Cost of Attendance (Budgets)
    - Terms & Conditions
- Financial Aid Programs
    - Scholarships
    - Grants
    - Loans
    - Work-Study

- o Veterans Services
- o Study Abroad & International
- What's Next
  - o Email Notification
  - o Reporting Changes
  - o Financial Aid Disbursement
  - o Satisfactory Progress
  - o Withdrawals & Repayments
- Additional Information
  - o Net Price Calculator
  - o Verification
  - o Worksheets & Forms
  - o Consortium Agreements (Co-Enroll)
  - o Helpful Websites

**2.D.9 Students receiving financial assistance are informed of any repayment obligations. The institution regularly monitors its student loan programs and the institution's loan default rate.**

The SOU Financial Aid Office has one dedicated staff member for our federal direct loans (Subsidized, Unsubsidized, Parent PLUS, and Grad PLUS). This person makes sure our website is up-to-date with the current federal loan information, including details about loan repayment. We also require that students complete their loan entrance counseling prior to receiving any federal loans. The director of financial aid monitors the SOU loan Cohort Default Rate (CDR) to ensure we are maintaining a good CDR. Currently, our official FY12 CDR is 6.4%. This is well below the state (Oregon) FY 2012–13 average, which is 13.7%, and well within the acceptable standard set by the US Department of Education.

**2.D.10 The institution designs, maintains, and evaluates a systematic and effective program of academic advisement to support student development and success. Personnel responsible for advising students are knowledgeable of the curriculum, program requirements, and graduation requirements and are adequately prepared to successfully fulfill their responsibilities. Advising requirements and responsibilities are defined, published, and made available to students.**

To ensure students have the knowledge, skills and support they need to be successful at Southern Oregon University, we require all new first-year and transfer students to attend ROAR, a summer orientation and registration event (see 2.A.16). For students unable to attend these events, a new student one-on-one advising appointment is arranged. As part of these orientation events, faculty and academic advisors meet with students to explain degree

requirements and develop appropriate fall course schedules as well as orientation to online resources, including the online Catalog, and events. To ensure students fully understand University policies and academic requirements, students are also required to meet with an advisor prior to registration for each term at SOU during their first year and at regular intervals thereafter. Advising holds are placed on students' accounts, preventing registration without a current advising plan developed with an academic advisor. Additionally, as students declare their major course of study, each student is assigned a faculty advisor through their program to assist them with the requirements for the major. Students also have constant access to University policies and academic requirements through our online Catalog and DegreeWorks, SOU's online advising portal.

To ensure the quality of advising, the Academic Advising Office has a well-developed hiring and training program. Academic advisors must at a minimum have a bachelor's degree (most advisors have master's degrees) and several years of advising experience prior to hiring. New advisors are provided with an extensive training manual outlining SOU policies, degree requirements, best practices for advising, and other relevant information. In addition to learning this manual, they shadow a fully trained advisor for several weeks before interacting with students on their own. Once the advising coordinator determines a new advisor is ready to take on student appointments, the new advisor is observed for several more weeks by an experienced academic advisor to ensure a successful and accurate advising interaction. Feedback is provided after each student-advisor interaction.

Additionally, academic advisors serve on relevant University committees and meet once a week as a group to share updates on policy, curriculum, and degree requirements. Academic advisor responsibilities are communicated to students at their new student advising sessions. Each student receives a degree requirement guide, which outlines the academic advisor's roles and responsibilities so advisors can be held accountable. Academic advisors also electronically enter an advising comment after each student-advisor interaction that is tagged with the advisor's name. This provides advisors, faculty, and support staff with a running record of what has taken place in each advising interaction as well as indicating whom to contact if more information is needed. Should an error of fact be made in advising, it can be immediately traced to the source and resolved.

**2.D.11 Cocurricular activities are consistent with the institution's mission, core themes, programs, and services and are governed appropriately.**

Cocurricular activities are consistent with the Institution's mission, core themes, programs, and services and are governed appropriately. All cocurricular programs endorse the University's mission of inclusivity, student success, intellectual growth, and responsible global citizenship.

Categories of clubs and organizations include: academic, arts & culture, community/sustainability/volunteer service, religious, cultural/international, professional/career, recreation, outdoor pursuits, club sports, residence halls, social and

political issues, student government, traditions, multicultural coalitions, and identity-based resource centers. All cocurricular activities housed within Student Life are student fee-funded and therefore subject to the bylaws governing the student fee. All units must be an entity on SOUConnect, register their organization, and register all of their events and activities. Should the entity choose not to register, no funding is allocated and use of University resources (e.g., staff support, room rental, and use of the SOU "brand") is prohibited. The majority of policies center around risk mitigation to protect students and the University from financial, physical, emotional, or reputational risk.

**2.D.12 If the institution operates auxiliary services (such as student housing, food service, and bookstore), they support the institution's mission, contribute to the intellectual climate of the campus community, and enhance the quality of the learning environment. Students, faculty, staff, and administrators have opportunities for input regarding these services.**

All University auxiliaries contribute positively to the institutional mission. Our University Housing Office manages the areas of Campus Dining, Conference Services, Family Housing, and Residential Life. The Bookstore and Student Union operate to service students, staff, and guests in all capacities. All the auxiliaries are aligned with the goals of the Academic & Student Affairs Division and participate in University governance, with seats on the Provost's Advisory Council, Student Success Committee (formerly Student Engagement Council), and University Planning Board.

Campus Food Service is outsourced and provided by A'viands, which works in partnership with the director of housing and operations. Campus Dining Services provides all residential food service, Student Union dining, and catering for the campus. The Bookstore is outsourced and provided by Barnes & Noble. These two partnerships ensure the University values of sustainability, affordability, and collaboration are supported.

All auxiliary organizations meet regularly with students, faculty, and staff in person as well as conduct survey assessments to improve services and continue contributing to the University learning environment.

**2.D.13 Intercollegiate athletic and other cocurricular programs (if offered) and related financial operations are consistent with the institution's mission and conducted with appropriate institutional oversight. Admission requirements and procedures, academic standards, degree requirements, and financial aid awards for students participating in cocurricular programs are consistent with those for other students**

Southern Oregon University participates in the NAIA and is a member of the Cascade Athletic Conference in all sports except Football (in the Frontier Conference) and Wrestling (an independent program). Approximately 400 student-athletes participate in 13 sports (seven women's teams and six men's). The athletic director currently reports to the president, who has

ultimate authority for the program. The faculty athletic representative (FAR) functions to provide institutional oversight and departmental guidance.

Prospective student-athletes are subject to the same admission policies and procedures as the student body. An 11-step process for verifying eligibility includes a review by coaches, registrar, FAR, and the athletic director.

For Title IX participation purposes, SOU relies on Test Two "Program Expansion" of the three-part test for participation by gender. It has shown a "history and continuing practice of program expansion which is demonstrably responsive to the developing interests and abilities of the members of the underrepresented sex." Financial assistance to athletes is proportionate in compliance with federal regulations. Benefits and opportunities are provided equitably.

The department, classified as an auxiliary operation, is dependent on student fees as well as general fund, donations, and self-generated revenue. The athletic booster club generates approximately $300,000 annually for athletic scholarships.

The department funds are audited internally and prior to 2015 were audited through the Oregon University System's Internal Audit Division. They received a number of recommendations in a 2005 audit that resulted in creating a fiscal analyst positions and the revision of processes and procedures.

Progress has been made toward fulfilling the mandates of a 2009 Presidential Athletics Task Force, which provided a comprehensive analysis of Athletics' mission; cost-effectiveness, profile in the University; parity in funding from student fees and general fund; increase in student-athlete enrollment; and recognition of the SOU Athletics Program as one of the top in the NAIA.

2.D.14 **The institution maintains an effective identity verification process for students enrolled in distance education courses and programs to establish that the student enrolled in the distance education course or program is the same person whose achievements are evaluated and credentialed. The institution ensures the identity verification process for distance education students protects student privacy and that students are informed, in writing at the time of enrollment, of current and projected charges associated with the identity verification process.**

Southern Oregon University meets the federal standards of authenticating the identity of distance learning students by requiring a secure login and password for access to all student computing resources. Student privacy is maintained throughout computing systems such as enrollment, personal digital storage, learning management system, and email. Student identity is divulged only to others enrolled in a course, and all data relating to student performance and assessment is visible solely to the student being evaluated and the course instructor.

General information regarding proctored exams is posted on the [Distance Learning website.](#) The information includes the following introduction to proctored exams and describes three methods for arranging for an exam proctor.

Scheduling a Proctored Exam:

"Some courses and programs at SOU require one or more proctored exams during the term. Taking a proctored exam means formally identifying yourself and taking an exam under the supervision of a proctor, either at an authorized testing center or online. It is your responsibility to locate a proctor and to provide information about the proctor to your instructor. It is very important to find a proctor and reserve a testing time well in advance of the actual date you need to take the exam. Many testing centers book quickly during peak exam times and your instructor will need time to forward testing information to your proctor. It is also your obligation to pay any fees associated with having your exam proctored."

Departments with online degree completion programs are moving toward requiring proctored exams. The School of Business has established a policy that at least one exam must be taken in a proctored environment in every fully online course. To support faculty in managing the administration of their proctored tests, we have created a module in our LMS that contains information about the policy, student resources for locating a proctoring site, and a questionnaire for students to specify where and when they will take the exam. All faculty can upload this module into their course sites.

## 2.E LIBRARY AND INFORMATION RESOURCES

2.E.1 **Consistent with its mission and core themes, the institution holds or provides access to library and information resources with an appropriate level of currency, depth, and breadth to support the institution's mission, core themes, programs, and services, wherever offered and however delivered.**

In accordance with the SOU mission, Hannon Library preserves and provides access to print-based and electronic information resources to ensure "student success, intellectual growth, and responsible global citizenship." The transition to digital information over the last decade has greatly increased student and faculty access to information resources. Hannon Library, despite budgetary constraints, provides an ever-expanding range of innovative services and information resources in multiple traditional and electronic formats. Librarians select materials to meet the instructional, informational, and research needs of the University. Highest priority is given to materials that support undergraduate instruction.

Responsibility for selection follows a distributed model involving subject librarians in close consultation with academic departments. Students and faculty are able to make online requests for library materials and suggestions about library services. Selection is also guided by

feedback received from numerous surveys of students and faculty as well as by review of usage data for books, e-resources, and journals.

The Curriculum Committee requires the library to submit an assessment of the adequacy of library collections for all significant changes to program offerings. Though the library sets aside funds to acquire books and films that support new academic programs and new faculty needs, if the library determines its information resources are insufficient to support the new or modified program, additional funds for collections are requested. Although not required, the library also submits collection assessments for minor program changes that support the library's overall collection assessment efforts as well as more deeply integrating collections assessment with curricular assessment.

Hannon Library successfully provides resources to support undergraduate programs despite its continuously shrinking materials budget and high rate of materials inflation, particularly for electronic resources. Between FY02 and FY15, Hannon Library's materials budget declined 36%, from $592,824 to $399,573. Annual resource inflation rates of as much as 5% further challenge the library's ability to adequately support the curriculum. To have a collections budget with the buying power of FY02, Hannon Library would have required a collections budget of $1,117,858 in FY15.
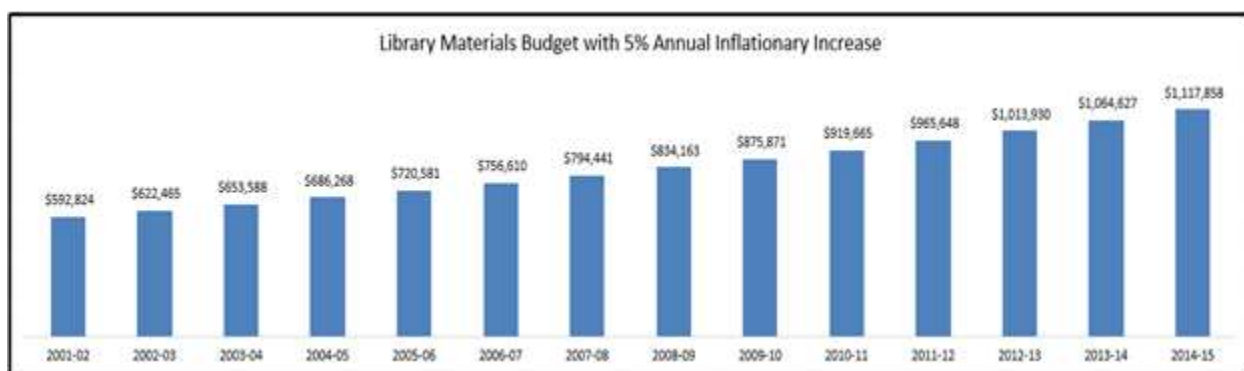


Hannon Library also compares poorly with other libraries in the public university system in Oregon. In FY14, SOU spent the least per student ($87 per FTE) on library materials.

**OUS Libraries - FY15 Library Materials by FTE**

[Note: Does not include OCLC, binding, or processing; FTE average of 3 terms FY14]

| | | | | | | |
|---|---|---|---|---|---|---|
| $310 | $184 | $173 | $142 | $118 | $99 | $87 |
| UO | OSU | PSU | OIT | WOU | EOU | SOU |
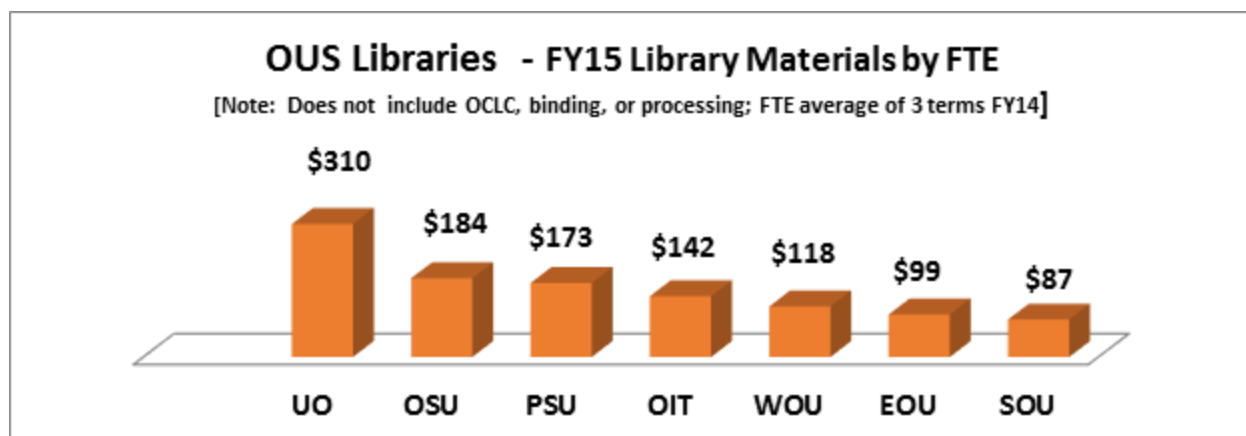
Despite these difficulties, Hannon Library is continuing its transition from providing mostly print-based resources to mostly electronic. Students and faculty continue to report a preference for electronic resources (see section 2.E.2), and over 50% of Hannon Library's materials budget is devoted to electronic resources. Hannon Library provides access to 79 licensed databases, many with full-text content, eight more than in FY12. The library subscribes to 24,787 unique e-journal titles via publisher packages (e.g., Wiley, Sage, Springer, ACS, APA) and our aggregator databases (ProQuest, Ebsco, and Gale). Hannon Library's Alma UResolver software, employing the OpenURL standard, makes it easy for users to quickly bring up full-text content regardless of vendor. During AY15, the library engaged in a rigorous database evaluation, resulting in migration of many databases to the ProQuest platform and cancellation of less-used e-resources. As a result, the library was able to add several databases, improving library support of the University curriculum. The library's ability to provide electronic access to journals has become increasingly important as budget cuts have reduced its ability to provide print journals. Since the Year Three Report, the library has cancelled 114 print journal subscriptions, 17% of the total.

Book and monograph collections tell a similar story. The number of books purchased by Hannon Library has decreased by 60% since AY 2001—from 5,291 in FY01 to 1,081 in FY12.

**Number of Print Books Purchased by FY**

| FY01 | FY02 | FY03 | FY04 | FY05 | FY06 | FY07 | FY08 | FY09 | FY10 | FY11 | FY12 | FY13 | FY14 | FY15 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 5291 | 4651 | 4353 | 3666 | 1691 | 2128 | 424 | 1775 | 1487 | 287 | 1053 | 1081 | 1121 | 992 | 1323 |
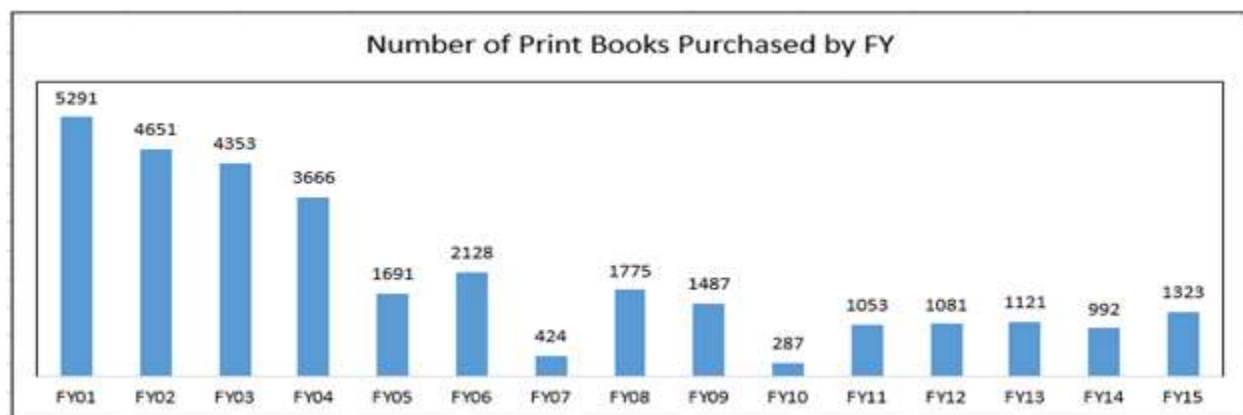
Hannon Library increasingly relies on gift books to supplement the collection. The library benefits from the many writers, scholars, and emeritus faculty who relocate to the Ashland area and subsequently donate books. While these unique materials add to the diversity of the Orbis Cascade Union catalog, they do not necessarily meet the needs of students for current materials that support the University's instructional programs. To optimize access to materials cataloged in our Ex Libris Integrated Library System, staff create links in bibliographic records to the digital version of items when available, enrich subject headings, and add searchable contents notes. To support the curriculum, Hannon Library increasingly depends on e-book collections to make up for print. The library now provides access to 255,960 e-books, a 245% increase since AY12. Unfortunately, the e-book market is not entirely stable, so the collection of e-books available to students and faculty can change. It is also unclear that the e-book market is sustainable for publishers, making reliance on e-books as a long-term substitute or even supplement for print problematic. That said, demand-driven e-book purchases may provide better alignment between library collections and curriculum. An Orbis Cascade Alliance pilot of "data-driven" e-book acquisitions may improve that alignment further.

Hannon Library's physical collections continue to grow. As of June 30, 2015, Hannon Library's physical collections include 340,015 volumes; 687 print journal subscriptions; 295,618 state and federal government publications; 16,980 microfilm reels; 793,244 microfiche; 10,131 maps; 4,004 prints; 1,796 audio recordings; and 10,271 video recordings. During the last three years, the library has engaged in targeted annual weeding of books and films. Hannon Library has also expanded its collection of streaming audio and video files since the Year Three report— 123,222 audio files and 1,069 streaming video files.

The climate-controlled, secure Special Collections/University Archives houses rare, valuable, and historically significant books and manuscripts, including the second (1632) and fourth (1685) folios of Shakespeare; the *Workes of Benjamin Jonson* (1616); and Raphael Holinshed's *Chronicles of England, Scotland, and Ireland* (1587). Unique resources include the 8,000-volume Margery Bailey Collection of Shakespeare and English Renaissance materials; significant collections in Native American studies and viticulture/enology; and a local history and bioregion collection covering the six counties of southern Oregon and counties of northern California. A new reading room opened in 2015 and has led to greater usage of Special Collections and University Archives. Searchable, online finding aids to manuscript collections are added continually.

Hannon Library continues to develop unique digital collections centered around Special Collections, other collections on campus, and collections of regional partners. The Southern Oregon Digital Archives contains 14 image collections, three text-based collections, and the institutional repository. Grants from IMLS and LSTA have allowed Hannon Library to develop the technical infrastructure to add content to existing digital collections and develop new collections. Collections added since the Year Three Report include images of butterflies and bees from the SOU Insect Museum; the Jim Rock Tin Can Collection from the Southern Oregon University Laboratory of Anthropology (SOULA); and the Wine of Southern Oregon Collection.

Content in Hannon Library's open-access institutional repository, Scholarship@SOU, is expanding. Faculty and students submit their scholarly artifacts electronically with the easy online submission form. Photographs, publications, and other historic records have been added from the University Archives. The interface to Hannon Library's Southern Oregon Digital Archives was redesigned in 2015.

Providing access to government publications continues to be a priority of Hannon Library. As a selective depository (30%) for Oregon's large Second Congressional District, Hannon Library serves a multicounty rural constituency. Since 2004, when the US Government Printing Office awarded Hannon Library the second annual prestigious Federal Depository Library of the Year Award, the Government Documents Department has continued to be at the forefront of making government information available at all levels of the liberal arts curriculum in a variety of disciplines, including the humanities.

Grey literature—including reports of regional state and federal agencies—is scanned and added to digital collections. Monthly displays promote students' understanding of and engagement with government information. The library catalogs selected Congressional Research Reports and electronic documents. Each year, the government publications librarian delivers approximately 30 government-information–focused instruction sessions to undergraduates. The government publications librarian is also researching a program introducing classes to government smart technology applications using iPads so students can have government information literally at their fingertips.

**2.E.2 Planning for library and information resources is guided by data that include feedback from affected users and appropriate faculty, staff, and administrators.**

In AY 2008–09, Hannon Library engaged in strategic planning designed to lead the library through 2013. The plan developed four themes interwoven into eight strategic areas.

Strategic Themes:

- Reach out beyond the walls of the library to seek opportunities to partner and collaborate.
- Engage students, faculty, and community to build and sustain working relationships.
- Create the library as a hub for learning and a campus focal point for social and cultural events to develop a stronger campus community.
- Use and provide instruction to new technology tools to move the library and SOU into an increased online environment.

Strategic Areas:

- Collections
- Access to Collections

- Instruction
- Public Service
- Library as Place
- Outreach
- Personnel and Organization
- Advancement

Each strategic area was subject to assessment, usually involving usage statistics (see section 2.E.4) or user surveys. Hannon Library faculty, in collaboration with the University Assessment Committee, have also been deeply engaged in assessment of information literacy (see section 2.E.3).

Hannon Library has greatly benefited from the services of a Business Administration course in which students develop marketing surveys. Between 2009 and 2014, students conducted seven surveys of student and faculty use of Hannon Library. In 2009, three surveys were conducted, one on library facility use, one on student laptop usage, and a third on the library website. The facility use survey indicated student demand for additional power outlets, which the library installed. The laptop survey informed how the library checks out laptops. The website survey indicated student satisfaction with the library website.

Two surveys were conducted in 2010, one on physical and virtual library usability and another on faculty use of the library. In the usability survey, 75.6% of users reported they "always" or "often" found the resources they needed, but some expressed interest in extended library hours. In response, Hannon Library worked with student government to secure supplemental funding for extended hours during Quiet Week and finals week. The faculty survey indicated a preference for electronic resources as well as the desirability of the library as a physical space. Partly in response to this survey, the library has increasingly directed its collection budget toward electronic resources as opposed to print (see section 2.E.1).

Two additional surveys were conducted in 2014. One examined the use of library resources by distance students, particularly electronic resources and the library website. The other examined student knowledge and use of the Learning Commons. The distance education survey found relatively few distance students use library resources, suggesting limited engagement with information literacy, at least in some distance education courses. It also revealed some distance users find the library website difficult to use. In response, librarians and the director will work with faculty to incorporate greater use of library resources in distance education. Librarians have also developed additional video tutorials to assist distance students. The library is currently conducting website usability testing, with the goal of rolling out a revised library website in AY 2016–17. The Learning Commons survey found many students were unaware of the services provided in the Learning Commons, particularly services not traditionally associated with libraries such as tutoring and career advising. Partially in response to this survey, the Learning Commons began hosting "Long Night Against Procrastination" events in

AY 2015–16. These events promote and provide the services of the Learning Commons late into the night. The library recently started using SOUConnect to measure event attendance and student demographics. The library has seen a considerable increase in library use during Long Night events.

In AY 2014–15, library support programs, including the Tutoring Center and Career Connections, were added to a database system for tracking program outcomes called TracDat to improve assessment. Hannon Library identified six outcomes for library support:

- Migration to a new Integrated Library System (electronic library catalog)
- Reference desk service
- Acquisition of print and electronic resource in support of academic programs
- Expansion of digital collections
- Improved access to Special Collections
- Addressing of staffing challenges

Strategic planning was delayed by the retirement of the former dean of Hannon Library and the hiring of a new University librarian in 2014. A new round of strategic planning was initiated in AY 2015–16, starting with the creation of a new library mission statement. The new mission statement aligns the mission of the library with the mission of SOU by incorporating the SOU mission:

As the cultural and intellectual center of Southern Oregon University, Hannon Library inspires a passion for learning. To support the mission of the University—*an inclusive campus community dedicated to student success, intellectual growth, and responsible global citizenship*—Hannon Library aspires to excellence in:

- Access. Ensure user-friendly access through information technologies and partnerships that offer optimal discoverability and use of information resources in physical and virtual library spaces.
- Collections. Select and acquire diverse electronic and print resources that support all academic programs of the University.
- Information Literacy and Instruction. Teach students and assess their ability to think critically and use information for their academic, professional, and personal lives.
- Outreach, Programming, and Development. Promote intellectual growth through a wide range of programming, events, and outreach activities that attract campus and community constituencies into inviting spaces.
- Service, Research Assistance, and Student Success. Provide exceptional service, research and technical assistance, tutoring, career advising, and other initiatives aimed at fostering student success.
- Strategic Planning. Engage in ongoing assessment and strategic planning that informs all of these activities.

Each of these six areas corresponds to assessment outcomes in TracDat (see 2.E.4).

**2.E.3 Consistent with its mission and core themes, the institution provides appropriate instruction and support for students, faculty, staff, administrators, and others (as appropriate) to enhance their efficiency and effectiveness in obtaining, evaluating, and using library and information resources that support its programs and services, wherever offered and however delivered.**

Hannon Library provides a proactive and comprehensive Information Literacy & Instruction Program in support of the teaching and learning mission of the University. Our mission is to teach students to think critically and use information for their academic, professional, and personal lives—helping them define information needs, then locate, evaluate, and use all available information resources effectively, ethically, and responsibly. We are committed to anticipating and embracing changes in the information and instructional environment as well as to collaborating with the academic community to foster a shared sense of enjoyment and empowerment in the pursuit of lifelong, self-directed learning.

At Southern Oregon University, information literacy is a foundational goal strand of the [University Studies general education curriculum](#) along with critical thinking and oral and written communication. The following goal strands and proficiencies outline the abilities of an information-literate individual to:

### 1. Determine the nature and extent of information needed.

*Proficiencies: Students will be able to:*
1. Develop and refine research questions.
2. Identify key concepts and terms required to locate information.
3. Examine and assess potential resources specific to research purpose.

### 2. Access information effectively and efficiently.

*Proficiencies: Students will be able to:*
1. Differentiate among keywords, subject headings, and descriptors.
2. Differentiate between primary and secondary sources.
3. Implement a variety of information search strategies.
4. Use the full array of library services to retrieve information.

### 3. Evaluate information and resources.

*Proficiencies: Students will be able to:*
1. Determine accuracy of information by questioning source of data.
2. Analyze limitations of information gathering tools or strategies.
3. Investigate differing viewpoints in the information.

4. Integrate information ethically and legally.

*Proficiencies: Students will be able to:*

1. Retrieve and manipulate information across contexts and in multiple formats.
2. Understand intellectual property, copyright, and fair use of information.
3. Cite sources using appropriate documentation style, without plagiarism or misrepresentation.

The four information literacy outcomes were developed by the library as one of the foundational goal strands at the University. Each outcome has associated measurable proficiencies. A corresponding Institutional Information Literacy Assessment Rubric [Exhibit 2.E.3 Info Literacy Rubric] created by the library in partnership with the University Assessment Committee is one of the major instruments for assessment on campus and within the Hannon Library Information Literacy & Instruction Program.

The main emphasis of the Hannon Library Information Literacy & Instruction Program is to provide academic support to students and departments through direct instruction, reference, one-on-one consultation, email and phone reference, virtual reference, web conferencing, and text messaging. One-on-one consultations with students at Reference or by appointment provide much-needed in-depth assistance directed at specific topics. In all aspects, librarians teach students to find information effectively and efficiently as well as to use the information ethically.

Library instruction is provided in multiple ways, most frequently following a hands-on workshop in one of the two computer classrooms equipped with 31 or 32 workstations, an instructor workstation, a projection unit, and a sound system. Library faculty work closely with program faculty to develop assignment-related instruction for each class taught. Library faculty concentrate on integrated instruction that is constantly constructed and reconstructed for every class session. The curriculum is based on the *Information Literacy Competency Standards for Higher Education* [Exhibit 2.E.3 Info Lit Competency Standards Higher Education] and *Framework for Information Literacy for Higher Education* [Exhibit 2.E.3 Framework for Info Literacy Higher Education] as recommended by the Association of College & Research Libraries.

Over the past six years, library faculty taught an average of 209 classes for 3,912 students per year: 89 upper division or graduate courses for 1,595 students and 60 first-year University Seminar or lower division courses classes for 1,143 students. This reflects the library's primary focus on upper division and graduate courses and students while at the same time continuing information literacy and research sessions for first-year students. In addition, library faculty average 225 one-on-one individual instructional consultations and 618 email and phone consultations each academic year.

The following chart illustrates the total number of classes during the 2009–15 academic years and includes the number of classes by level over the past six years:
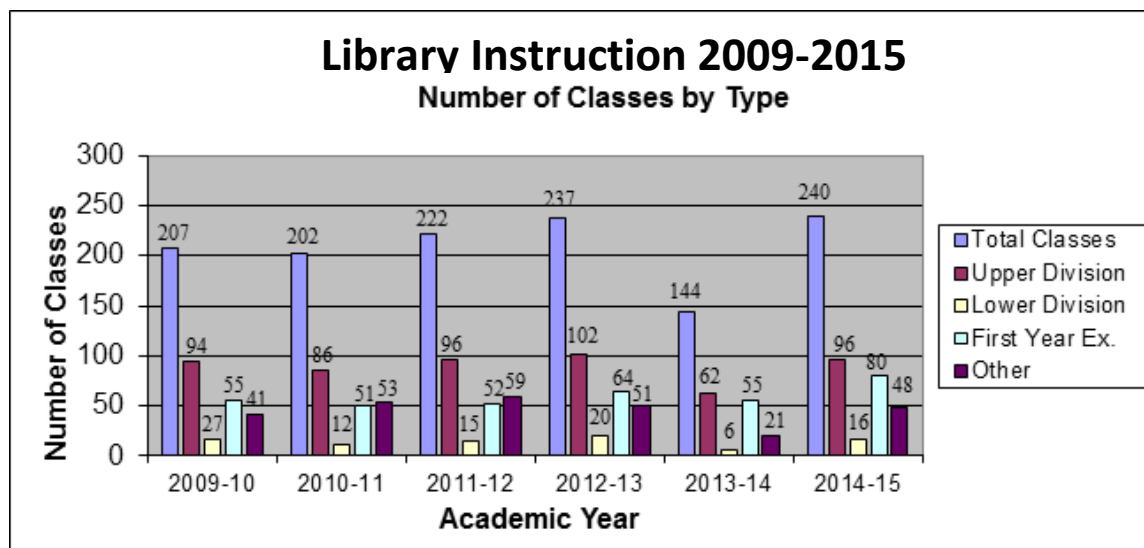


The following chart reflects the total number of students attending library information literacy and instruction classes during the 2009–15 academic years. The chart also includes the total number of students attending classes by level over the past six years:
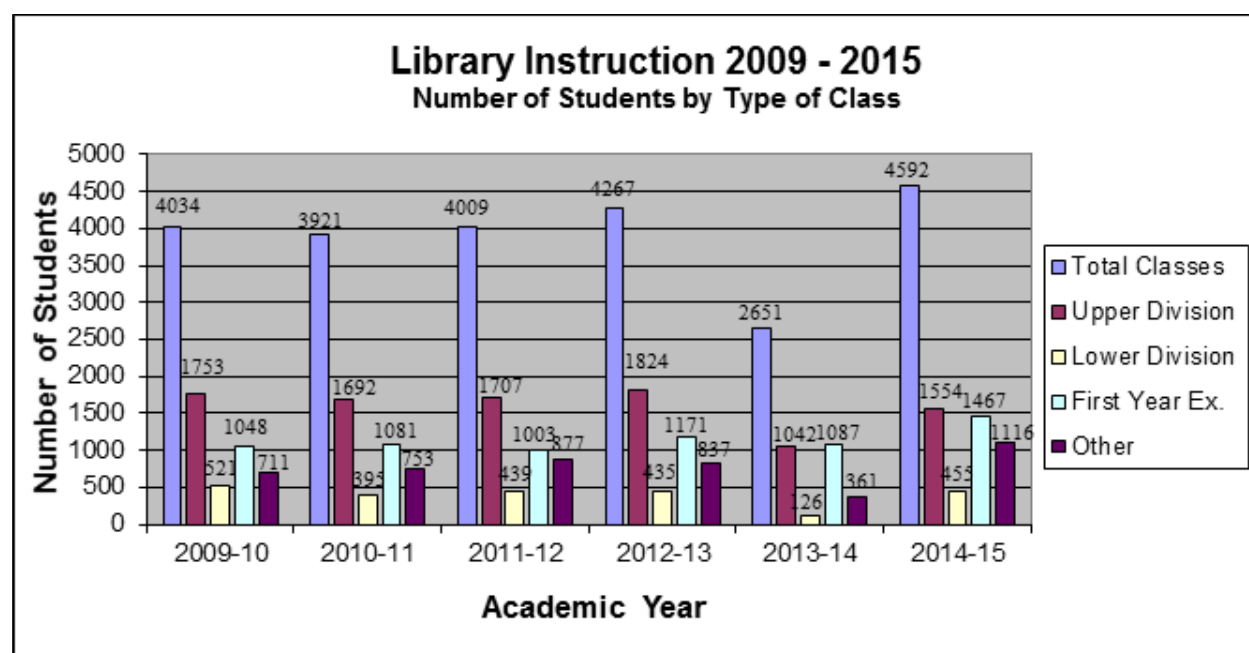


Library faculty measure student achievement and the effectiveness of information literacy and instruction program through five assessment processes. First, librarians are evaluated by students completing anonymous evaluation forms following library instruction sessions. The forms are sent directly to the library department chair for compilation as per faculty bylaws. Second, librarians engage in a formative assessment process, collaborative peer conversation,

to improve teaching both in the classroom and at Reference. Library faculty meet in peer teams to articulate intentions prior to a teaching session and meet afterward to reflect on the session. Third, data is collected more informally through observations, conversations, one-on-one sessions, and other methods such as clickers. Fourth, the library uses campuswide surveys to monitor how students are using the library and its resources. Fifth, and perhaps most significantly, Hannon Library faculty conduct an information literacy assessment using a citation analysis rubric developed to score student writing samples.

The assessment of student papers began in the 2012–13 academic year and is ongoing. Student work samples have been assessed at different academic levels—at the end of the first year (FUSE), senior writing samples (Capstone), and from students entering the Master's of Teaching Program in Education.

The information literacy citation analysis assessment measures six proficiencies:

1. Recognizes the necessity to cite appropriate sources related to subject matter.
2. Cites sources in a consistent format.
3. Selects sources relevant to subject matter.
4. Distinguishes timeliness of sources—current unless of historical significance.
5. Incorporates a high quality of discipline-appropriate or peer-reviewed sources.
6. Integrates a range of sources—books, articles, government documents, websites—appropriate for subject matter.

The data generated from the assessment of student work samples is reviewed by library faculty in a two-part process. First, recommendations are sent to the University Assessment Committee (UAC) and are used to improve student achievement in the foundational goals institutionally. Hannon Library faculty also review the results of the assessment to inform and improve faculty teaching and student learning as a part of the Information Literacy & Instruction Program. After we score the writing samples of our students, we ask, "What are we doing in our curriculum and teaching that contributes to the score?" If our data indicate all students are achieving what we set out to teach them, then we still have to examine why the students did well. If students score well, then we use the data as rationale to continue what we are doing as it is contributing to the success of the students. In the same way, if the data indicate there is room for improvement, then we look for how we can better achieve our mission.

To facilitate all course delivery options, library faculty have created research guides for their subject disciplines to help students access library resources in their specific discipline. The research guides are featured prominently at the top of the library website with a dropdown menu to facilitate easy navigation. The research guides provide a listing of all resources accessible and applicable to research within any specific subject area. Each guide also includes the contact information for the library liaison to that subject area. Students from first-year courses and on through graduate courses are directed to use research guides within their

course discipline to find the most appropriate databases, additional web resources, books within the discipline, citation help, online tutorials, and the subject librarian.

Classroom instruction is often augmented with a hybrid online presence within Moodle, the course management system, as well as online tutorials available from both the Hannon Library website and the research guides. Some librarians serve as co-instructors on Moodle sites to answer questions and provide online research assistance. All courses in Moodle include a link to both Hannon Library and a discipline-based listing of research guides. The library also has a tab on the University portal and a link on the University mobile app. For additional research assistance, Hannon Library offers a virtual reference chat that accesses the librarian at the Reference & Learning Commons Desk. The virtual reference service provides an additional instruction alternative for students at the point of need.

In addition to providing consultations, librarians teach at the Reference Desk, staffing the desk 65 hours per week during the regular terms. Annual statistics at the Reference Desk were in decline until we decided to add technical and directional assistance into our statistics. These types of questions are often the basis of a teaching opportunity as well as a time when library faculty can reach out to make students more comfortable with approaching faculty for assistance. The following chart represents the number of Reference transactions from the 2009–10 to the 2014–15 academic years:



Reference Transactions 2009-10 to 2014-15
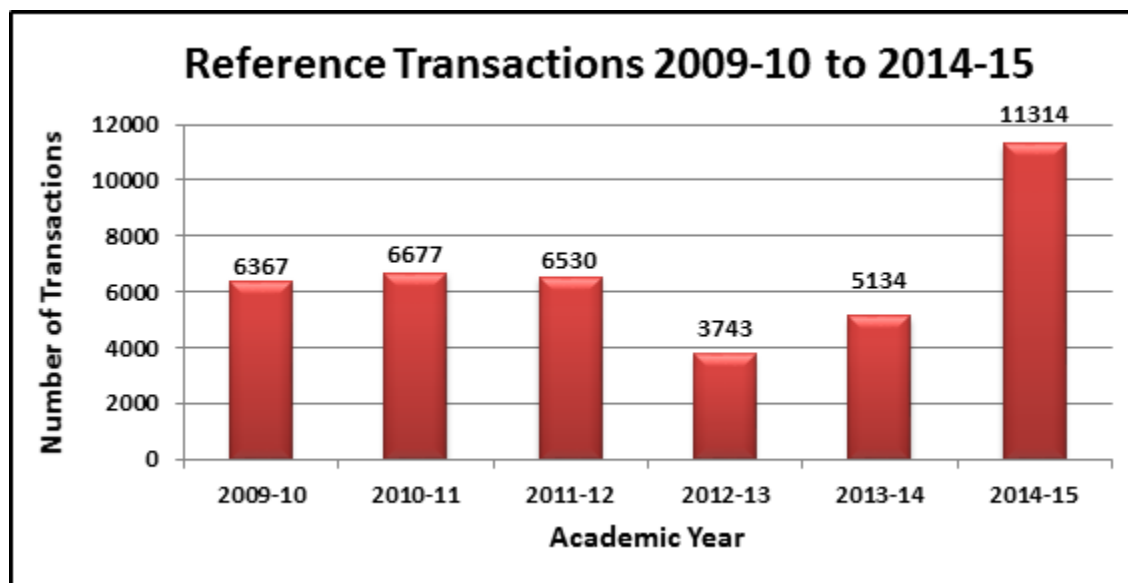
Overall, the major emphasis of the Library Information Literacy & Instruction program is to provide academic support to students and programs through direct instruction, reference, one-on-one consultation, email and phone reference, virtual reference, web conferencing, and text messaging. In all aspects, librarians teach students to find information effectively and efficiently as well as to use the information ethically. Information literacy is a foundational goal strand built into the entire curriculum from the first-year to capstone through upper division and graduate programs.

2.E.4 **The institution regularly and systematically evaluates the quality, adequacy, utilization, and security of library and information resources and services, including those provided through cooperative arrangements, wherever offered and however delivered.**

Hannon Library strives to facilitate student success, intellectual growth, and responsible global citizenship through services, collections, and support programs. Library services and collections are informed and driven by diverse data, including the quantitative measures of usage data, circulation statistics, surveys, and student evaluations as well as diverse qualitative sources of information gleaned from the many intersections of library staff with faculty and students. Hannon Library looks to measures of performance to inform planning, continually assessing current services and resources to adopt rapidly evolving information technologies and meet evolving student needs.

Eight librarians and 13 staff provide an increasing array of cutting-edge services, including iPad and laptop checkout and a Digital Media Gallery for showcasing student productions. The first floor Learning Commons (LC) houses student computer workstations and a help desk staffed by librarians and student assistants. The Tutoring Center offers support in writing, math, and science. Career Connections provides career advising. Students have access to a total of 128 Windows-based workstations and 14 Macs in the Learning Commons area and two electronic classrooms as well as 15 laptops and 18 iPads for checkout. Three scanners, four high-speed black/white printers, and a color printer are available. New photocopiers also provide a popular free "scan-and-send" feature.

The library is typically open 85 hours per week during the school years. Extended hours during Quiet Week, 24/7 hours during finals week (with free coffee and cookies), and the quarterly Long Night Against Procrastination events are examples of ways Hannon Library reaches out to meet student needs and contribute to student success.

In planning for online and print collections, Hannon Library incorporates analysis of usage, assessment of strength of holdings in particular disciplines, consultation with departments, and data on program size and curricular needs (see section 2.E.1). Each year, print journal and electronic resource subscriptions are examined, with analyses of price, usage, and alignment with the curriculum to ensure limited funds are spent effectively. The evaluation process for potential new e-resources usually includes a campuswide trial promoted by library faculty. Hannon Library has an effective liaison structure for collaboration and communication with academic departments and supporting new courses and academic programs. Library faculty serving on the University Graduate Council and Curriculum Committee learn about new and evolving academic programs.

Using an algorithm developed by SOU Mathematics faculty, the library allocates remaining funds to purchase books while factoring in academic program variables like number of majors, student credit hours, program level (major, minor, certificate, graduate), and average price of books for each discipline.

Even with budgetary limitations, Hannon Library is committed to providing student-centered services and supporting the teaching and learning mission of the University. A climate of continual assessment and ongoing strategic planning activities helps Hannon Library to successfully meet the challenge of providing core services with fewer people and resources.

The library's catalog, online government publications, digital collections, and institutional repository are open-access. Licensed electronic resources are available to anyone within the Hannon Library building; however, from off campus, only faculty, students, and staff have access. Access to licensed electronic resources from off campus requires authentication using SOU network credentials.

Patron information is maintained within Hannon Library's Integrated Library System (ILS). ILS data is located on a server in a secure area. Patron data can only be accessed by authorized library staff through individually assigned user accounts. Patron information is updated daily.

## Other Feedback

SOU's institution-wide assessment culture is evident in the library through its strategic plan (see section 2.E.2). Student and faculty surveys indicate that the library is dedicated to planning, assessment, and making changes to enhance services and collections. In addition to formal surveys, the library uses a number of informal methods of assessment to ensure high-quality services and collections.

Probably the most active mode of faculty feedback is the library's liaison program. Each librarian is responsible for providing a number of services to specific academic departments. Liaisons meet with individual faculty members and departments on a regular basis. Faculty-librarian interactions from these efforts guide our instructional program, collection development, and digital initiatives.

Library staff interaction with students at service points and in instructional sessions provides excellent feedback. As library staff engage with students, they learn students' perspective on our services and collections. These interactions take place at various service points—including Reference, Circulation, Periodicals, and Special Collections/Archives—and through instructional sessions and one-on-one conferences. Students also have the opportunity to use an online Suggestion Form and online book request form.

Additional data and feedback are gathered through library staff participation in campus committees and governance structures. These committees and governance structures include the Directors Council, Academic Senate, University Planning Committee, Curriculum Committee, Assessment Committee, and Graduate Council.

As Hannon Library begins a new strategic planning process for 2014–19, the data gathered over the past five years will be a critical component in creating a new plan.

## Cooperative Arrangements

Because of cuts to the collections budget, Hannon Library has become increasingly dependent on its participation in the Orbis Cascade Alliance, a consortium of 39 academic libraries in Oregon, Washington, and Idaho.

Hannon Library saves considerable money through its participation in consortial e-resource purchasing through the Orbis Cascade Alliance. Discounted prices negotiated through the consortium provide savings up to 60%. Publisher packages, including those from the American Psychological Association, Springer, Wiley, and SAGE, together with three JSTOR collections and aggregator databases, provide more journal content than the library was ever able to purchase in print. The decline in print journal subscriptions has been accompanied by a dramatic increase in e-journal content. Over the last eight years, Hannon Library has cancelled 31% of its paid print journal subscriptions, from 992 in 2004–05 to only 687 at this time. This contrasts to our paid access to 24,787 unique e-journal titles via publisher and aggregator databases.

The impact of budget reductions has been somewhat ameliorated by our subscription to ebrary's *Academic Complete*, a growing e-book collection that currently contains 116,616 monographic titles with recent imprint dates. Additionally, Hannon Library participates in an Orbis Cascade Alliance consortial project to provide e-books based on patron selection (demand-driven acquisitions). Beginning in FY17, we will be participating in a publisher (Wiley) evidence-based e-book project.

Students and faculty also have the opportunity to request print books at no cost from our consortium, which includes 39 academic libraries in Oregon, Washington, and Idaho. Summit, the union catalog of the Orbis Cascade Alliance, contains more than 10 million titles. Materials are picked up and delivered daily via a courier system to each school, with a delivery turnaround time of five to seven business days. Although this access is not as convenient as books housed in our building, students and faculty are still able to get books within a short time for almost any research topic. In the rare instance that a title is not available from either our library or an Orbis Cascade member library, it can be requested via interlibrary loan.

The Orbis Cascade Alliance recently completed the phased migration to a new Ex Libris SILS (Shared Integrated Library System). Implementation proceeded in four cohorts of member libraries over a two-year period beginning in early 2013. Hannon Library was in Cohort Three, and our migration from an Innovative Interfaces ILS to this new shared platform occurred in 2014.

# 2.F FINANCIAL RESOURCES

**2.F.1 The institution demonstrates financial stability with sufficient cash flow and reserves to support its programs and services. Financial planning reflects available funds, realistic**

**development of financial resources, and appropriate risk management to ensure short-term solvency and anticipate long-term obligations, including payment of future liabilities.**

Although ongoing stability with state funding remains a challenge, recent funding has improved and has had a significant positive impact on the University's ability to fund operations. However, reliance on other revenue streams to support ongoing expenditures—primarily tuition—continues and has led to greater emphasis on recruitment and retention of students. Managing costs continues to be a high priority. SOU has met these challenges through investments in student success strategies, funded by focused one-time funding from the state and a shift in the state funding model (an outcomes-based funding model vs. one that was primarily calculated on enrollment only). Shifting the budget process to the current RCM (Responsibility Center Management) has strengthened the connection of revenues and expenditures throughout the campus and resulted in greater transparency when it comes to identifying the resources needed to support programs. Limiting salary increases and instituting faculty/staff furlough days over the 2015/17 biennium minimized expenditure growth in the short term while maintaining efforts to minimize growth in tuition fees. Some programs have migrated toward "differential" tuition pricing whereby these programs can recognize the added costs of providing the programs by setting separate tuition pricing that ties in better with the market demands for these particular programs.

While our ending cash balance remains strong, at the close of Fiscal Year 2015, our ending fund balance for the Education and General Fund Group stood at 9.1% of total revenues. This represented an increase from the prior year and exceeded budget projections for FY2015. The University has developed long-term budget plans and has implemented a financial pro forma projection process that is used to inform the board and help identify priorities going forward.

The fiscal year ending cash position for current unrestricted funds has been maintained at a rate of about 9% when compared to total spending. This position had diminished for a period, largely tied to a reduction in the state's investment in higher education through the issuance of state appropriations. Levels of state funding have increased over the last few years, with a nice increase in FY2015.

In FY2013, SOU's ending E&G fund balance dropped below the SBHE threshold of 5%. This caused the University to enter into a process called retrenchment, which allows the University to take action to reduce costs such as eliminating academic programs and noticing the associated tenured and tenure-track faculty for reasons other than cause. These actions resulted in a formal retrenchment plan being submitted to the then Oregon University System (OUS) Chancellor's Office and ultimately being approved by the State Board of Higher Education (SBHE). This retrenchment plan included specific actions to be taken by the University and projected a financial pro forma through the academic year 2017–18 showing how the Institution's E&G fund balance would grow to 10% of operating revenues or better. The SBHE, in partnership with SOU, developed a set of performance metrics to measure the

successful implementation of the retrenchment plan. Authority to monitor SOU's success in achieving these metrics was transferred to the Oregon Higher Education Coordinating Commission (HECC). A formal reporting schedule was established, and SOU continues to strictly follow the retrenchment plan and report on its performance metrics.

Long-term capital obligations, both state-paid and institution-paid, can be funded through a variety of funding options:

- General Obligation XI-F Bonds: Issued to finance construction to be repaid from revenues to be generated from the use of the facility.
- General Obligation XI-G Bonds: Issued to finance designated educational buildings and facilities with debt service funded by state legislative appropriations. XI-G bonds require a 50% institutional match.
- General Obligation XI-Q Bonds: Issued to finance designated educational buildings and facilities with debt service funded by state legislative appropriations. XI-Q bonds do not require any institutional match.
- Oregon Department of Energy Loans – Small Scale Energy Loan Program (SELP): Loans issued for energy conservation projects. Can be either state- or institution-paid. Payments are made in accordance with loan agreements and are typically funded through energy savings generated from the project.
- Lottery Bonds: Special obligations of the state, secured and payable from net revenues of the Oregon State Lottery.

Institution-paid debt service obligations associated with bonds are reflected in annual budget projections. During fiscal year 2012, SOU entered into a public/private partnership to build new housing for students. The North Campus Housing project provides housing for 702 students and is intended to replace older housing complexes that will either be taken offline or repurposed. The Debt Burden Ratio for SOU has been holding relatively constant, well under our required 7% debt burden ratio.

*Debt Burden Ratio (principal and interest/total adjusted expenses):*

| 2011 | 2012 | 2013 | 2014 | 2015 |
|------|------|------|------|------|
| 3.4 | 3.1 | 2.6 | 2.5 | 4.1 |

2.F.2 **Resource planning and development include realistic budgeting, enrollment management, and responsible projections of grants, donations, and other non-tuition revenue sources.**

SOU uses Responsibility Centered Management (RCM) as its philosophy for approaching the budgeting of institutional resources across all fund groups throughout the campus. Advantages of this approach include:

- All revenue is fully allocated directly to the departments associated with generating those revenues. This includes allocating tuition revenues to the academic departments as well as allocating state appropriations to instructional activities.
- Creates a stronger connection between revenues to the related expenses used to generate those resources.
- Provides greater responsibility and accountability for decision making at the department level.
- Heightens transparency in the budget process. All budgets are presented to and reviewed by the Budget Committee, which makes recommendations.
- Identifies opportunities more quickly to take advantage of changing trends in the market as it allows a greater number of financial decisions to be made at the local decentralized level.
- Allows central administration to focus on planning.

The budget process is a year-round process that typically starts in October of each year and continues through the following April and May wherein:

- Budgets are established across all fund groups and revenue and expense lines.
- Revenue and expenditure trends are reviewed.
- Enrollment patterns are reviewed and projected. Each academic department participates with Institutional Research, Registrar's Office, Budget Office, and Management, when it comes to projecting student credit hours by department and program.
- New factors (e.g., COLA increases) are reflected in expenditure projections. This—in connection with projected enrollment trends and changes to state funding—is used to establish new tuition rates.
- Housing rates are set based on projected occupancy and other estimated operating costs, including the payment of debt obligations as well as maintaining adequate building and equipment reserves.
- Pricing for all other fee-based revenues is set through an additional price-setting process that results is rates being set through a separate public-hearing approval process.

Ongoing revenue and expenditure activity is further reviewed throughout the year, and a formal quarterly report is generated for management and board review. Deviations from initial budget projections are identified, explained, and used to strengthen projections for the year

under review, and inform budget projections for the upcoming year developed by the Budget & Finance committees. Final approval of the annual budget is made by the Board of Trustees.

**2.F.3 The institution clearly defines and follows its policies, guidelines, and processes for financial planning and budget development that include appropriate opportunities for participation by its constituencies.**

Policies, guidelines, and processes for financial planning and budget development take place at the institutional level. Most University policies have been migrated to the SOU Policy Repository website. Institutional budgeting culminates in the adopted budget proposed by the president being adopted by the SOU Board of Trustees.

The Campus Budget Calendar provides the structure and guidelines identifying when budgets are to be rolled out for review and update by each department on campus, when the budgets are to be submitted, deadlines for updating various fees, and the process for review at the various levels across campus.

All budgets are reviewed by individual departments (chairs/managers, directors, and vice presidents) and the Finance Committee, which makes recommendations to management based on enrollment projections, impacts on state funding, and other priorities.

Budgets associated with activities being funded through Student Incidental Fees are reviewed through the SOU Student Senate (ASSOU). Recommendations for funding are put forward to the University president for approval.

Budgets associated with tuition or other student fee increases also go through a public hearing process that includes bringing these before the SOU Student Senate to obtain student input in the process.

**2.F.4 The institution ensures timely and accurate financial information through its use of an appropriate accounting system that follows generally accepted accounting principles and through its reliance on an effective system of internal controls.**

With the dissolution of the Oregon University System (effective July 1, 2015), SOU adopted the Internal Management Directives (IMD), which requires all accounting records and reports to be in conformity with generally accepted accounting principles. [Exhibit 2.F.4 IMDs 6.003 6.004 6.005 Accounting Records & Cash] SOU also adopted OUS OARs and Fiscal Policy Manual, which are currently being revised for application specific to SOU. The University is audited on an annual basis by an independent certified public accounting firm. Following the FY2015 Independent Auditors' Report, the auditors stated in a letter to the SOU Board of Trustees, "In our opinion, based on our audit and the report of other auditors, the financial statements referred to above present fairly, in all material respects, the respective financial position of the business-type 2015 Annual Financial Report activities and the discretely presented component unit of the University as of June 30, 2015, and the respective changes in financial position and,

where applicable, cash flows thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America." See page 6 of the SOU Audited Financial Statements for FY2015. [Exhibit 2.F.4 SOU Financial Report 2015] Business Services has also posted the past five years of audited financial statements on its website (included within the Public Records tab).

SOU uses the Ellucian Banner software for its finance, human resources, and student systems. University accounting represents the utilization of full accrual accounting in alignment with GAAP. SOU employs a system of internal controls to safeguard its assets and resources. Accounting activity is monitored and reviewed centrally. In addition, during 2014, SOU established a Service Center, which was intended to aid departments with centralized purchasing, monitoring, and processing of transactions. The primary mission of the Service Center is to aid departments with the acquisition of goods and services; provide timely processing of accounting, budget, purchasing, payroll, and human resources transactions; and enhance the level of consistency across the campus when processing transactions being recorded in the finance system.

Accounting records are also reviewed through annual audits conducted by an outside audit firm as well as internal audits. Prior to the dissolution of the OUS, internal audits were conducted by the OUS Internal Audit Division. SOU has now formed its own internal audit department. In March 2016, after a long search process, SOU employed an internal auditor with the requisite education and experience. A comprehensive internal audit charter has been adopted by the Executive and Audit Committee of the Board of Trustees. The internal audit charter requires an annual risk-based internal audit plan. It also documents the necessity of the professional standards of integrity, objectivity, confidentiality, and competency as well as the types of assurance and consulting services to be performed to add value, support accountability, and improve operations. It is the objective of the internal auditor to bring a systematic, disciplined approach to evaluating and improving the effectiveness of SOU's risk management, internal control, and governance processes.

**2.F.5 Capital budgets reflect the institution's mission and core theme objectives and relate to its plans for physical facilities and acquisition of equipment. Long-range capital plans support the institution's mission and goals and reflect projections of the total cost of ownership, equipment, furnishing, and operation of new or renovated facilities. Debt for capital outlay purposes is periodically reviewed, carefully controlled, and justified, so as not to create an unreasonable drain on resources available for educational purposes.**

Short- and long-range capital budgets reflect goals and objectives and relate to plans for physical facilities and acquisition of equipment. SOU conducts facilities planning by use of the Campus Master Plan [Exhibit 2.F.5 Campus Master Plan] and strategic planning in the context of budget forecasting and modeling in conjunction with the Oregon Higher Education Coordinating Commission (HECC) and state legislative process. This most recent facilities master plan was prepared in 2010 and covers the period until 2020. The plan provides a

detailed assessment of SOU's capital construction needs. It addresses future facility needs, campus access, land use, and academic space issues.

The Campus Master Plan is predicated on projections of enrollment growth, and it responds to the academic planning process, which has been proceeding in parallel to the physical planning process, and several primary goals of the University:

- To create academic distinctiveness and quality
- To foster a commitment to the arts and the bioregion
- To play a role as a community catalyst
- To achieve financial sustainability

The plan provided for a significant shift in the structure of the campus through the development of new student housing via a public-private partnership relationship. This came together in 2012 through the SOU partnership with the Collegiate Housing Foundation to construct the North Campus Village housing community. This partnership provided for the construction of two new housing buildings, providing more than 700 beds, intended to replace the capacity previously available in the aging Cascade Housing complex, which will eventually be demolished. The new housing complex began operations starting in fall term 2014. The Cascade Complex is currently providing transitional space for offices as other facilities are temporarily taken offline for remodeling and updating.

Additional plans included upgrades to numerous buildings:

- Remodeling the Theatre Building
- Adding an addition to the Theatre Building that will include a new home for Jefferson Public Radio operations.
- Replacing the McNeal Athletic & Physical Education facilities.
- Adding an addition to the new McNeal to include a Student Recreation Center.
- Remodeling and upgrading the Science Building, Britt Hall, and Churchill Hall through deferred maintenance building projects.

SOU is conservative in issuing debt for capital outlay and does not issue short-term or long-term debt to fund operations. Long-term debt is typically issued for major capital outlay within the auxiliary enterprises. The State of Oregon issues debt for general University capital outlay. SOU and/or OUS financial reports containing debt service schedules are maintained and reported annually. Audited financial statements contain appropriate note disclosures as required by generally accepted accounting principles.

Other Debt Opportunities

Oregon law and the Oregon constitution authorize the ability to issue two types of general obligation bonds. These types of debt are limited to Article XI-G to finance designated

educational buildings and facilities with debt service funded by state legislative appropriations. Starting in FY2016, these XI-G bonds will be taken of the SOU financial statements and will reside directly on the financial statements for the State of Oregon as a whole. Bonds under Article XI-F are used to finance the construction of self-liquidating projects where the debt obligations are being paid through a revenue stream being generated as a result of the construction project. These XI-F bonds reside directly on the SOU financial statements and are tied to the unit generating the revenue stream being used to repay the debt obligation.

Requests for bonds follow a formal approval process through the Institution, HECC, governor, and legislature (or the Emergency Board if the legislature is not in session). The state treasury is responsible for the issuance of debt securities, and the University is responsible for the maintenance of institution-paid debt service. The University uses the University Shared Services Enterprise (USSE) to support the ongoing oversight of the timely payment of debt obligations. Debt obligations for all types of debt are reported on the financial statements of the unit responsible for repaying the debt obligation. Debt associated with XI-G bonds will be removed from the University financial statements starting with FY2016.

**2.F.6 The institution defines the financial relationship between its general operations and its auxiliary enterprises, including any use of general operations funds to support auxiliary enterprises or the use of funds from auxiliary services to support general operations.**

Southern Oregon University's auxiliaries operate on budgets developed to support University strategic planning and are intended to be fully self-supporting. Auxiliary directors and managers develop expense budgets for their respective operations based on programmatic needs, historical costs, contractual obligations, market conditions, and fee constraints. The Service Center provides assistance to directors as needed when it comes to bringing their budgets together. They receive guidance from the Budget Office regarding anticipated increases in labor and utilities. Labor budgets are developed position by position. SOU auxiliaries are primarily fully self-supporting, and fees are developed to cover operating expenses, debt service, current and future major maintenance, and asset replacement expenditures. Athletic operations receive some support from the general fund. Occasionally, auxiliary enterprises will transfer funds to the University to support other educational initiatives, and this is reflected as a direct transfer within the University financial statements. Impacts of any such transfers are reviewed through the annual budget process and recommendations put forward through the Board Finance Committee.

The Budget Office assists with coordinating the auxiliary budget process. Periodic Management Reports are performed by Finance & Administration and are used to project anticipated revenue and expenditure trends across current unrestricted operating funds. Financial performance and projections are reviewed by management and presented to the SOU Board Finance Committee for review and comments. In preparation for these periodic

reviews, Finance & Administration works with auxiliary directors to identify trends impacting each unit. This is also used to aid in future budget development.

Budgets are reviewed by the Budget Office, Business Services, Service Center staff, auxiliary directors, and vice presidents before being presented to the Board Finance Committee for approval.

Budgets for student activities, student union administration and operations, and athletics funded by incidental fees are also reviewed by the Student Fee Committee and its subcommittees. Proposed fees and rates are presented to various campus constituent groups—including the University Planning Board, ASSOU Senate, and Budget Committee—before they are presented to the president and President's Cabinet, and then presented to the SOU Board of Trustees. If the overall tuition and fee increases being proposed exceed 5% in total, then the proposal for rate increases is also presented to the Oregon Higher Education Coordinating Commission (HECC) for review and approval. The role of the HECC in the state higher education activities can be viewed on the HECC website.

**2.F.7 For each year of operation, the institution undergoes an external financial audit, in a reasonable timeframe, by professionally qualified personnel in accordance with generally accepted auditing standards. Results from the audit, including findings and management letter recommendations, are considered in a timely, appropriate, and comprehensive manner by the administration and the governing board.**

As of July 1, 2015, SOU became a separate independent entity. Prior to July 1, 2015, annual independent external audits were contracted by the State Audits Division and supervised by the OUS system to ensure compliance with Generally Accepted Accounting Principles (GAAP). SOU has entered into a two-year contract with the audit firm of Clifton, Larson, Allen (CLA) for annual financial statement audit.

The federal government requires an annual federal compliance and internal control audit of expenditures charged to federal grants and contracts. Past audits, performed for the State of Oregon, and future audits, performed by CLA, follow the requirements of the Office of Management and Budget (OMB) Circular A-133. A management letter is published as part of the documents produced in the audit process. A copy of the latest Statewide Single Audit Report can be viewed on the Oregon Secretary of State website.

Starting July 1, 2015, all SOU's fiscal operations and corresponding internal controls are subject to review by the SOU Internal Audit Office. The SOU Internal Audit Office reports to both the president of the University and SOU Board of Trustees. Prior to July 1, 2015, the University collaborated with the OUS Internal Audit Division to provide input into the audit plan, assemble necessary data for audits, ensure recommendations are reasonable and practical, and implement recommendations as appropriate. Starting July 1, 2015, University management collaborates with the SOU Internal Audit Office when performing these functions.

Reviews completed by the Internal Audit Division included an examination of procedural steps to conduct an exit conference, develop a draft report, obtain management responses to suggestions, and follow up in six to twelve months to ensure agreed-upon changes have been implemented. Similar reviews conducted by the Oregon Secretary of State Audits Division include a request for an agency response detailing actions taken to correct identified deficiencies. Again, followup is conducted in subsequent periods to ensure institutional responsiveness. The OUS Fiscal Policy Manual required institutions to implement recommendations provided by the external auditors. The former OUS Fiscal Policy Manual was adopted by SOU going forward after the dissolution of the OUS system and is currently being rewritten specifically for SOU. All audit reports are available upon request for examination by the accreditation team.

**2.F.8 All institutional fundraising activities are conducted in a professional and ethical manner and comply with governmental requirements. If the institution has a relationship with a fundraising organization that bears its name and whose major purpose is to raise funds to support its mission, the institution has a written agreement that clearly defines its relationship with that organization.**

There are two major entities involved with fundraising activities at Southern Oregon University: the University's Office of Development and Southern Oregon University Foundation. The Development Office works in collaboration with University academic and administrative leaders to raise private philanthropic dollars to advance the University's mission. All philanthropic dollars raised are managed and invested by the SOU Foundation, the University's affiliated 501(c)(3) nonprofit foundation.

Both the foundation and University subscribe to Council for Advancement and Support of Education (CASE) standards governing fundraising activity and reporting. As such, the programs stipulate the manner in which donor information is maintained to protect donor privacy; provide internal procedures for coordinating, cultivating, and soliciting high-level gifts; outline donor recognition and stewardship procedures and activities; and state the policy for naming buildings, rooms, and other facilities in recognition of donor gifts. The University and SOU Foundation jointly set the policy on minimum endowment levels and payout rates for endowments.

The SOU Foundation operates under a shared services agreement, which is renewed annually with the University. Since its incorporation in 1959, the SOU Foundation has existed solely to support Southern Oregon University. The Foundation Board of Trustees manages current-use funds as well as an endowment valued at $25 million. The foundation contracts with Kaspick to invest and manage the endowment and life income funds. All funds are distributed according to donor wishes. The foundation is independently audited.

The contract between Southern Oregon University and the SOU Foundation clearly articulates a) the Oregon laws under which the foundation operates, b) when and how the foundation

may use the Southern Oregon University name, c) the independence of both entities, and d) the relationship between the two entities in terms of accepting gifts and investing and administering funds for the University. The contract also outlines the type of support the University provides to the foundation and the foundation provides to the University. The contract formally establishes the joint development of guidelines that both the SOU Office of Development and the SOU Foundation will use in soliciting and administering contributions on behalf of the University.

# 2.G PHYSICAL AND TECHNOLOGICAL INFRASTRUCTURE

2.G.1 **Consistent with its mission, core themes, and characteristics, the institution creates and maintains physical facilities that are accessible, safe, secure, and sufficient in quantity and quality to ensure healthful learning and working environments that support the institution's mission, programs, and services.**

The Southern Oregon University (SOU) campus in Ashland sits on 178 acres of land and consists of fifteen major academic and administrative buildings (interactive campus map available here). The SOU Medford campus consists of one major facility that includes laboratories, classrooms, and administrative offices, which are colocated in a facility shared with Rogue Community College (RCC).

On the main campus in Ashland, there is a total of 1,423,882 gross square feet of buildings, of which 515,492 gross square feet are maintained by auxiliary enterprises. Several of the buildings on the campus were constructed 50 or more years ago: Churchill Hall (1926), Britt Hall (1936), Central Hall (1949), McNeal Hall (1957), and the eastern portion of the Science Building (1959). Other buildings erected in the 1960s and 1970s include Taylor Hall (1965), Music Building (1972), and Education/Psychology Building (1973). More recent additions include the Theatre Arts Building (1981), Computing Services Center (1990), Visual Arts Complex (2000), and Hannon Library Expansion (2004). Located in downtown Medford, the Higher Education Center (HEC) is the most recent "new" academic space added. The HEC opened in AY 2008-09.

Recent Capital Improvements

Since the previous report, several major capital projects have been completed. The first was new construction of the Higher Education Center in downtown Medford. This facility allows SOU to accommodate all of its Medford-based programs under one roof rather than at multiple locations throughout the city. The 68,700–square-foot building includes the following spaces: 28 classrooms, two multipurpose rooms/classrooms, a 100-seat presentation hall, a videoconference classroom, a science lecture hall, three science class laboratories, a lab prep room, a seminar room, a business center, three computer labs, faculty offices, support staff offices, and conference rooms.

The second major capital improvement was the renovation of Churchill Hall, which was entirely paid for with state-provided deferred maintenance funds. The entire first floor wad demolished and rebuilt, and major sections of the second floor were also remodeled. A large lecture hall that was remodeled in 2009 was preserved during the whole building renovation. The entire heating, ventilation, and cooling system was replaced along with related utilities and services. The OHSU School of Nursing moved from several locations across campus to the second floor of Churchill. SOU administration and business offices occupy the first floor. The remodel also added three new classrooms.

In 2013, two new residence halls and a new dining facility were constructed on the north side of campus. Funded through a public-private partnership, the residence halls provided more than 700 new beds, replacing the two oldest residence halls.

The Science Building was remodeled in 2014–15. Entirely funded with state deferred maintenance dollars, this project was completed in winter 2015 and included a complete seismic, mechanical, and electrical renovation along with interior finish upgrades. The architectural firm Soderstrom and Associates began design work in spring 2013, with the project starting in summer 2014. The entire building was renovated with the exception of the central auditorium, which received new ceilings, lighting, and a demonstration table.

The Schneider Museum of Art, Marion Ady and Art Complex, McNeal Hall, and Science Building had roof replacements within the last three years, which leaves the Computing Services Center (20 years) and Hannon Library (9 years) as the only academic buildings with roofs older than five years. No administration or support buildings (that are not scheduled for removal) have roofs older than 20 years other than the Bookstore, sections of the Computing Services Center, and Susan Holmes. Those are scheduled for repair in 2017 and 2018 respectively. Annually, between $500,000 and $1,000,000 is spent on campus maintenance repairs. These are funded biannually by the state, and the total amount varies based on the allocation.

Immediate Capital Projects

Capital projects planned for the next three years are a $10.2-million expansion and renovation of the Theatre Arts Building, a $17.7-million Student Recreation Center, a $21-million McNeal Hall, and a 6,500–square-foot Jefferson Public Radio studios addition to the Theatre Building. The state is funding all of these projects with the exception of the Jefferson Public Radio studios addition, which is funded by the Jefferson Public Radio Foundation.

The Theatre Arts renovation will include 22,150 square feet of new construction and 10,488 square feet of remodeled areas as currently designed. This new addition is needed to house the University's Theatre Department, the largest undergraduate theatre program in the western United States, and will help meet current enrollment growth. Within the former Oregon University System, SOU was designated a Center of Excellence in the Fine Performing Arts. The primary program requirements of the proposed Theatre Arts Expansion are:

1. the addition of three major instructional spaces—a rehearsal hall, 80-seat classroom, and computer laboratory;
2. expansion and modernization of existing facilities, including faculty offices, the Costume Department, business offices, and public restrooms; and
3. update of technical support spaces.

XI-G bond funds had been sold (2009) and are available for half of the project funding. In 2011, extensive surveys were conducted by nationally recognized recreation planners Brailsford & Donleavy (B&D) to gauge student interest in a new Student Recreation Center (SRC) at Southern Oregon University. B&D found "90% of respondents indicated that improvements to campus recreation would have a significant or moderate impact on their quality of life at SOU." In May 2012, SOU students passed a referendum to increase student fees to pay for a new Student Recreation Center and related facilities. OPSIS Architectural Firm was contracted in fall 2012 to develop conceptual design and determine the best location to construct the facility on campus. The firm Sink, Combs, and Dethlef was hired in summer 2015 to design both the SRC and McNeal buildings. The project will include a building of approximately 50,000 square feet and feature fitness space, basketball courts, running track, cardio rooms, and outdoor programs equipment space. The Recreation Center project is budgeted at $17.7 million. Construction has started, and completion is anticipated in fall 2017.

McNeal Hall—which currently houses academic classrooms, gymnasiums, activity spaces, a swimming pool, and locker rooms—was identified as seismically deficient when analyzed as part of a facility condition analysis report sponsored by OUS in 2008. The exterior concrete masonry walls showed cracks, and the entire facility was in poor and deteriorating conditions. ISES Corporation in 2008 conducted an energy conservation audit for McNeal Hall showing an annual savings of $56,160 if building equipment and lighting were replaced with equipment meeting current energy standards. The campus administration worked with local legislators and identified funding so this project could be coordinated with the Student Recreation Center project. Design is completed, and the McNeal building will be completely rebuilt to replace all existing functions but with a smaller footprint. The football, soccer, and track locker rooms; training room; and offices will be relocated under the existing stadium and paid for through fundraising.

## Future Capital Projects

A list of long-term planning for capital improvements on campus through 2023 [Exhibit 2.G.1 SOU Capital Projects 2011–23] outlines continued investments in the Science and Theatre Arts buildings as well as faculty/staff housing. However, until more analysis can be done on academic needs and program success—coupled with recently conducted prioritization and capacity studies—there may be additional needs for future capital priorities.

Another Sightlines report was conducted in spring 2016. Its results will give us direction on which buildings we should be focusing on for major and minor capital projects and repairs. [Exhibit 2.G.1 Sightlines Backlog and Capital Renewal]

## Classroom Upgrades

Annually, a portion of the capital repairs budget is allocated for classroom modernization and upgrades. In recent years (2012–16), these monies have been used primarily for buildings not scheduled for major capital renovation (e.g., Taylor, Central, Ed-Psych). For the current biennium, $150,000 was allocated for classroom modernizations. Since Churchill Hall, Science, and McNeal were recently remodeled or are currently being remodeled, these funds will be allocated based on priorities established by the Directors Council and Provost's Office. Typically, six to eight classrooms are remodeled per biennium. As teaching methods have changed to adapt to increasingly digital modalities and students, classroom renovations are needed. This current biennium, upgrades will focus on Taylor Hall and the Education/Psychology building.

## Capacity Study

During a capacity study completed in 2012 [Appendix 5.2 Capacity Study July 2012], it was determined the campus has more than enough capacity to meet current and near future enrollment growth. However, office space appeared limited along with the need for small "communal" study areas. Study areas have been added in the Science Remodel (2015) well as the McNeal building and Student Recreation Center. The Theatre Building addition will also have a large hallway/atrium that is being designed with small study spaces, soft seating, and WiFi access. In addition, the Computing Services Center east wing, which currently houses a large computer lab, is being review by the Campus Facilities & Utilization Committee for remodel.

## Administration/Overview

Facilities Management & Planning (FMP) is responsible for the operation and maintenance of instructional facilities on the Ashland campus and specified trades on the Medford campus Higher Education Center. The department absorbed the housing maintenance staff in spring 2012, and the Sustainability Program was added in 2014 along with the Environmental Health & Safety Department. FMP now provides maintenance and landscape services to all SOU facilities. Custodial services are provided for all academic and support facilities but not the auxiliary facilities. This has proven a successful merge, eliminating duplication of staff and services and achieving a significant savings to the overall campus budget of approximately 15% in total campus annual maintenance expenditures.

Facilities Management & Planning is structured into six divisions with the following staffing levels (including supervisors):

| | |
|---|---|
| Custodial Services | 14.5 FTE |
| Building Maintenance | 13 FTE |
| Landscape Services | 5 FTE |
| Utilities/HVAC | 7 FTE |
| Lock Shop | 2 FTE |
| Support Services | 3 FTE |
| Mail Services | 2 FTE |
| Environmental Health & Safety | 1 FTE |

The maintenance, management, and operation of instructional facilities are adequate, but reductions in FMP budgets and staffing have limited the maintenance that can be performed on instructional facilities. The amount of capital repair funding ($1,554,656 for 2011–13) provided by the legislature helps address deferred maintenance issues on instructional facilities. A list of deferred maintenance projects is vetted across campus, starting with building managers and then moving to academic directors and the Facilities Utilization & Planning Committee before being presented for approved by Executive Council.

## Landscape

Of the 178 acres of land owned by SOU in Ashland, FMP's Landscape Services maintains approximately 65 acres of turf and landscaped areas. Seventeen acres of SOU owned property is leased to two governmental agencies and a nonprofit community organization and is not maintained by Landscape Services staff. The Landscape Services staff consists of a supervisor and four grounds workers. There are three fewer grounds workers than when the previous self-study was submitted in 1997. This decrease in staff has made it more difficult to adequately maintain the grounds of the University. However, we are currently working to add student labor to help fill the gap created by these reductions.

## Custodial

The Custodial Division of FMP is responsible for the cleanliness of academic and administrative buildings. The division consists of one FTE custodial supervisor and 12.5 FTE custodians, who are responsible for 704,714 square feet of buildings. Each custodian is responsible for cleaning 56,377 square feet of building area. The Association of Higher Education Facilities Officers' (APPA) *Custodial Staffing Guidelines for Educational Facilities* assists facility officers in

determining the staffing needs for cleaning and identifying expectations from given staffing. APPA considers its Cleaning Service Level 3 to be the minimum acceptable cleaning service level. The 2009 guideline for APPA's Cleaning Service Level 3 ("casual inattention") is 28,758 square feet/custodian. With the present level of custodial staffing, the APPA Cleaning Service Level being achieved in campus buildings is Level 4 ("moderate dinginess"). A building manager is assigned to each campus building and serves as the primary contact person for the building in communication with FMP. The building manager is responsible for notifying FMP of any maintenance or safety-related issues in the building. FMP performs quarterly inspections of campus buildings (three buildings per quarter) to identify maintenance and safety issues that require attention. Work orders are then generated by FMP for correction of deficiencies. In summer 2012, we added custodial services for the Medford campus's Higher Education Center.

## Sustainability

Southern Oregon University has been evolving as a leader in sustainability for nearly a decade. As one of the campus' guiding principles, sustainability is fundamental to campus operations, academics, and student engagement. The University is regularly acknowledged by the *Princeton Review* and *Sierra Magazine* as a top green school in the country and has received a Silver STAR rating from the Association for the Advancement of Sustainability in Higher Education (AASHE). In recent years, SOU was a finalist for AASHE's Best Sustainability Case Study Award (2014) and the Second Nature Climate Leadership Awards (2015) as well as being awarded the Best Sustainability Case Study from AASHE in 2015. These accolades reflect SOU's holistic and innovative approach to demonstrating sustainability in higher education.

SOU more clearly delineated its commitment to sustainability in 2007 when former President Mary Cullinan signed the Presidents' Carbon Commitment, pledging the University to take action to address its carbon footprint. As part of the Carbon Commitment, the president established the Sustainability Council. The mission of the Sustainability Council is to advise, encourage, and coordinate the operations, research, and campus culture of Southern Oregon University in a manner consistent with the values and practices of environmental stewardship and sustainability; promoting individual, institutional, and community well-being. The council comprises 15 members, including students, faculty, staff, and administration. The council meets quarterly to discuss, research, and advise the president on innovative solutions to foster a sustainable, thriving campus. Noteworthy innovations that were generated by the Sustainability Council include developing the University's Climate Action Plan, devising The Farm at SOU: A Center for Sustainability, and earning the designation of the first ever Bee Campus USA.

Adopted in 2010, the Climate Action Plan (CAP) [Exhibit 2.G.1 Climate Action Plan] outlines the University's goals to reduce greenhouse gas (GHG) emissions, with the ultimate goal of achieving carbon neutrality by 2050. The CAP identifies interim targets for GHG reduction and highlights specific actions to reach those goals. Based on SOU's FY2014 GHG inventory, the University is on track to surpass the first target, which calls for GHG levels to be 5% below 1990

levels. Following this success, SOU has joined 83 other university leaders as charter signatories of Second Nature's new Climate Commitment. This new commitment will expand on the campus carbon neutrality commitment to revisit our goals and infuse resiliency planning as SOU continues its work to mitigate and adapt to a changing climate.

Much of the success in reducing SOU's GHG emissions can be attributed to integration of sustainability in campus operations and planning. In the past decade, the University has installed nearly 250 kilowatts of solar photovoltaics in five arrays on campus buildings. In total, the current solar asset generates more than 300,000 kWh annually. Concurrently, Facilities Management & Planning places a strong focus on reducing energy demand through lighting retrofits, controls measures, and green building. In addition to transitioning to highly efficient LED lighting, SOU has constructed four Leadership in Energy and Environmental Design (LEED) Certified buildings, including the LEED Platinum Higher Education Center and new LEED Gold residential and dining complex.

SOU students mirror the administrative and operational commitment to dynamic and influential sustainability practices as demonstrated by the student Green Fund. The Green Fund is from a fee students pay each term to support campus sustainability. The fund was first created in 2007 to purchase Renewable Energy Certificates and Carbon Offsets, setting SOU apart as the first university in the country to offset 100% of its energy use. In 2012, students voted to focus the money more locally, reorganizing the fund for another innovative purpose. The Green Fund was realigned to purchase Water Restoration Certificates (WRCs), distinguishing SOU as the first university in the country to offset 100% of its water use. The remainder of the Green Fund is available for student sustainability projects. Projects that have received funding in recent years include: The Farm at SOU, two solar array projects, lighting retrofits, and a bike rental program.

Students also explore sustainability in their academic ventures across a broad range of degree programs. SOU offers 150 sustainability-related courses and nine degree programs that address sustainability within their learning outcomes. These programs include the Sustainability Leadership Certificate, Environmental Science & Policy, and Outdoor Adventure Leadership. The Green House seminar delivers students' general education requirements through the lens of sustainability, with regular field experiences and engagement with campus sustainability projects. Within a year, Green House students learn about energy while touring the campus heat plant and solar arrays; analyze behavior and waste management while conducting campus waste audits; and discuss regional and national food systems and sustainable agriculture while attending work days at the University Farm.

All of these programs and initiatives contribute to the culture of sustainability at SOU. Throughout the year, various departments collaborate with SOU's Sustainability Program to host a variety of events to educate, motivate, and inspire the campus and community to be responsible global citizens. Recent events have featured international activists such as Raj Patel and Vandana Shiva, along with Health & Sustainability workshops and a week of dynamic

events in celebration of Earth Day. These programs, events, and outstanding achievements recognized are regularly communicated with campus constituents through a quarterly sustainability newsletter. The Sustainability Program also empowers the campus and community to engage in sustainable behaviors through the dissemination of monthly sustainability tips.

## Utilities

The Utilities Division is responsible for energy management and mechanical maintenance of all campus heating and cooling. The staff comprises one FTE utilities supervisor and six staff. Efforts have been made to reduce energy consumption by the University's heat plant and to improve the efficiency and performance of the HVAC systems in campus buildings. In 1999, SOU entered into an energy-saving performance contract with Johnson Controls, Inc. This contract includes annual evaluations of specific campus HVAC systems for review and evaluation of performance and energy consumption. In recent years, projects have included Music Hall fan and duct modifications and the Theatre Building's Black Box stage programming and duct modification. The contract ends this year (2016), and we will begin the process of reconnoitering to reassess and modernize our energy management program and controls.

Energy management improvements have been made in recent years, beginning in 2011–12 with the awarding of a grant from the Department of Energy to retrofit McNeal Hall, Taylor, and Central Halls (along with specified locations in other buildings) with new lighting (T-8) and motion controls for buildings. In 2012, we also made changes to the irrigation filter plant (filter equipment replacement) to reduce water consumption, and we are currently replacing campus irrigation controls and valves with a wireless centralized system to reduce water consumption. We hope to have the irrigation project completed by 2018. Proposed to and rejected by the SOU Board of Trustees, one major project to reduce carbon and generate our own power was the replacement of two low-pressure 1960s boilers with a new high-pressure steam boiler that would be fitted with a turbine to produce electricity. A $250,000 grant was procured from the USDA to evaluate the use of biomass rather than natural gas as the fuel source. We are now looking at other alternative sources for energy and their feasibility such as wind, methane, and additional solar. A list of projects is included in the exhibit. [Exhibit 2.G.1 Project Expenditure Summary]

Maintenance and Small Projects

The Building Maintenance Division consists of 13 FTE and one FTE supervisor and employs up to 14 students throughout the year to maintain all facilities on campus. They also provide preventative maintenance services at the Medford campus Higher Education Center. The team is split into two crews. The Reactive Maintenance Team handles typical calls for service on a daily maintenance and the Preventative Maintenance & Projects Team performs scheduled maintenance on buildings and handles small construction projects on campus. Maintenance is

tracked through the FAMIS work order system and is broken down by building, room, service type, cost, and staff. Many different reports are generated to review efficiency and record the cost of individual building maintenance. One of these studies, conducted by Sightlines for OUS in 2012 [Exhibit 2.G.1 Sightlines LLC SOU Facilities MB&A Report], showed we fell below national averages for staff per gross square footage and supervisors per staff and that we spend only $0.11 per square foot compared to the national average of $0.21. However, our buildings received above average ratings from our 2012 Quality of Services survey.

Lock Shop

Our Lock Shop oversees an extensive campus access system. This system is managed by one FTE supervisor and one FTE employee. All exterior building doors and classrooms are monitored by an electronic latching system. We can monitor access or lock down any building and classroom on the SOU campus. We issue fobs (small plastic devices with microchips) to all students, faculty, and staff to access assigned building rooms and living spaces. The newly constructed dorms are "keyless" except for individual bedrooms, which still require keys. We also have installed (2013) a campus mass notification system that is controlled through the fire alarm and door access system, which allows messages to be sent by voice through building speakers, texted on mobile devices, and phoned to cell phones. The buildings can be simultaneously locked in coordination with the messages.

Deferred Maintenance

Campus deferred maintenance is addressed within the yearly operations budget and also through biannual allotment of funds from the State of Oregon. These monies assist us with addressing major capital repairs (e.g., roofs, utilities, structural issues) as well as smaller building preventative maintenance projects (e.g., classroom modernizations, paint, toilet upgrades). We track the amount of monies spent on buildings each year along with other deferred maintenance projects. [Exhibit 2.G.1 Project Expenditure Summary]

**2.G.2 The institution adopts, publishes, reviews regularly, and adheres to policies and procedures regarding the safe use, storage, and disposal of hazardous or toxic materials.**

Southern Oregon University is committed to reducing risk and providing for a safe and healthy environment for employees, students, and the public. The Environmental Health & Safety (EHS) Office is staffed full time, year-round to ensure continuity of service and oversight as well as the ability to interact with and respond to departments and to promote environmental, occupational, employment, and other business practices safeguarding the valuable human, property, program, and financial resources of SOU. The manager of the EHS Department is chair of the Chemical Hygiene Committee, which meets annually to review the Chemical Hygiene Program and make any necessary changes to ensure the safety of all science programs. This program is published on the EHS web page. All hazardous waste is stored in approved storage facilities that meet state and federal standards, and waste is disposed of via OUS-approved hazardous waste vendors. SOU is a Conditionally Exempt Generator.

In conjunction with the Facilities Management & Planning staff, EHS conducts annual inspections of all academic buildings. Each building has an assigned building manager, who reports any irregularities to EHS. Hazard identification training is provided for these managers. Evacuation drills are conducted each term, and nighttime campus safety walks are conducted annually.

**2.G.3 The institution develops, implements, and reviews regularly a master plan for its physical development that is consistent with its mission, core themes, and long-range educational and financial plans.**

In 2009, the campus reviewed and updated its 10-year master plan, which emphasized the stated goals of SOU to create academic distinctiveness and quality, foster a commitment to the bioregion, play a role as a community catalyst, and achieve financial sustainability. The plan outlined a path to address the need to develop a strong student life component; support more sustainable development patterns, including development at densities that are both appropriate to the campus setting and supportive of transit and walkable communities; and make a determination that the oldest residential complex on campus requires extensive upgrades and does not serve the student body well.

The plan is reviewed annually with the Facilities Utilization & Planning Committee. It was reviewed when the Student Recreation Center was proposed in 2012 and was amended in 2015 when the Student Recreation Center and McNeal project was approved.

**2.G.4 Equipment is sufficient in quantity and quality and managed appropriately to support institutional functions and fulfillment of the institution's mission, accomplishment of core theme objectives, and achievement of goals or intended outcomes of its programs and services.**

A minimum of approximately $150,000 is allocated for classroom upgrades each biennium. This covers physical upgrades to the classrooms. Typically, programs will cover the cost of desk and chair upgrades, and the IT Department maintains and upgrades the smart equipment, which includes lecture computers, screens, and smart boards. Every classroom is upgraded on a seven-year cycle (or less for carpet and paint). With the completion of the McNeal renovation, Student Recreation Center, and Theatre projects, we should be able to replace all desks on campus with tables and chairs unless desks are permanently affixed. Additionally, FMP maintains an equipment replacement reserve and vehicle replacement reserve.

**2.G.5 Consistent with its mission, core themes, and characteristics, the institution has appropriate and adequate technology systems and infrastructure to support its management and operational functions, academic programs, and support services, wherever offered and however delivered.**

Southern Oregon University has a centralized Information Technology (IT) Department that supports our faculty, staff, and students as well as the infrastructure for our working and learning environments at both our Ashland and Medford campuses. The responsibilities of the department include management of the University's administrative information systems, academic software, telecommunications and Internet services, wired and wireless networks, networked storage, computer labs and classrooms, and technology-equipped classrooms.

The department is led by a chief information officer and consists of 23 staff divided into four teams: Information Systems, Systems & Networking, Classroom & Media Services, and User Services. The department shares responsibility for technology support at our Medford campus with Rogue Community College, with whom we jointly own and operate the building. In addition, the department employs many part-time student employees to supplement the work of full-time IT staff and provide direct services to the campus, including our switchboard and help desk. Unlike many centralized information technology departments, we are not organized around the activities of a help desk. Instead, the User Services Team consists of seven computing coordinators, who are assigned as single points of contact for technology issues in specific academic and administrative departments. By organizing its support services in this way, IT is held accountable for providing responsive service and issues do not remain unresolved and orphaned, which is more common with a help desk format.

## Administrative Information Systems

Southern Oregon University collaborates with three other public institutions (Eastern Oregon University, Western Oregon University, and Oregon Institute of Technology) and the University Shared Services Enterprise to centrally host, manage, and support Banner applications for student information, finance, accounting, and human resources from Oregon State University's campus in Corvallis, Oregon. This collaboration allows the smaller public institutions to achieve economy of scale by pooling our licensing, resources, and staff. With the dissolution of the Oregon University System, governance of this collaborative has shifted to the participating members.

Additional administrative systems are self-hosted by the University for a number of functions and departments. Some of these systems include reporting tools for SOU's TRiO and McNair Scholars Programs and fundraising software for the University's Development Office.

## Academic Software

The Information Technology Department provides many software resources to faculty and students for academic use. Whenever possible, the department has negotiated software site licenses for commonly used software packages such as SPSS, Qualtrics Research Suite, and ESRI ArcGIS. The department also coordinates the purchase and delivery of software specific to academic disciplines, including Mathematica and Adobe Creative Suite.

## Telecommunications, Internet

Much like the collaboration that supports administrative information systems, Southern Oregon University actively cooperates with the other Oregon public universities to provide telecommunications and Internet services.

The University self-hosts an Avaya PBX, which is monitored and supported by a collaboration based at Oregon State University. This collaboration allows all of the Oregon public universities to negotiate with telecommunications vendors as a single entity and pool limited technical resources for the benefit of all the campuses. Each campus is able to access technical resources that otherwise would be unavailable or prohibitively expensive. We currently have nearly 2,000 analog and digital telephone sets and have begun our transition to voiceover IP (VoIP).

Southern Oregon University is also a member of the Network for Education and Research in Oregon (NERO), which provides commodity Internet and Internet2 access to all of the Oregon public universities. As a member, we are not only connected with our fellow state universities but also to many K–12 school districts, community colleges, local and city governments, and state agencies. This collaboration benefits us not only financially but also provides access to national and research networks that would otherwise be unavailable to our institution due to both cost and our rural location.

## Wired and Wireless Networking

Southern Oregon University operates a nearly 3,000-node network at our Ashland campus and comanages a nearly 400-node network at our Medford campus with Rogue Community College. Our Ashland and Medford campuses are connected by a dedicated 1Gb/s fiber optic link. Each campus has an independent connection to the Internet through NERO but shares a single 350Mb/s of Internet and Internet2 bandwidth. Our campus buildings have 1Gb/s interconnections with 100Mb/s and 1Gb/s ports available for user devices (e.g., computers, printers).

The University's wireless network was recently expanded and upgraded to support 802.11AC, the fastest and most current wireless standard. There are currently more than 400 wireless access points on the Ashland campus that provide coverage to all campus buildings, including our residence halls. At our Medford campus, 21 access points provide complete coverage for our facilities. Our campuses share a single wireless configuration, which allows faculty, staff, and students to move seamlessly between the campuses without requiring any additional configuration for their wireless devices. We provide both authenticated and unauthenticated (guest) access.

The University recently joined eduroam, a worldwide collaborative that allows students, faculty, and staff to access wireless Internet at any participating institution. Reciprocal access at both of our campuses is granted to visitors from other participating institutions.

## Computer Labs and Classrooms

Southern Oregon University has nearly 80 computer labs and classrooms on the Ashland campus, ranging in size from small departmental computing clusters to a 55-seat general computing lab. The Hannon Library also operates a well-equipped Learning Commons, bringing together library resources, computers, and student support offices in a single location.

The Medford campus has two large computer classrooms that are also available for general lab usage when not scheduled for class use.

## Technology-Equipped Classrooms

There are 44 technology-equipped classrooms on the Ashland campus and 33 technology-equipped classrooms at the Medford campus. The classrooms at the Medford campus are shared with Rogue Community College. At the Ashland campus, all technology-equipped classrooms have at least a projector, laptop connection, and network access (wired and wireless). Most classrooms include a VCR/DVD player (or Blu-ray player), computer, and sound system. A few select classrooms include additional features such as a document camera, touch screen controls, or multiple projectors. At our Medford campus, all classrooms are built to the same standard and include a projector, computer, sound system, and podium with touchscreen.

**2.G.6 The institution provides appropriate instruction and support for faculty, staff, students, and administrators in the effective use of technology and technology systems related to its programs, services, and institutional operations.**

Unlike many centralized information technology departments, IT does not organize support functions around the activities of a help desk (although it does retain one). Instead, many points of contact are provided for faculty, staff, and students in need of support or instruction. IT's User Services Team consists of seven computing coordinators who are assigned as single points of contact for technology issues in specific academic and administrative departments. This encourages accountability, as it holds the team accountable for providing responsive service, and ensures that issues do not remain unresolved as is more common with a centralized help desk. Faculty or staff may call or email the help desk, call or email their assigned coordinator directly, or stop by IT's offices for walk-in assistance. This model of support has been enthusiastically embraced by SOU faculty and staff.

Student and on-demand assistance do rely on our help desk as the central support node. The help desk is staffed by students, but computing coordinators supervise the desk on a rotating basis. This allows IT staff to assess priority or urgency of issues as needed as well as provide of the student employees.  Help desk support is provided during the evening and weekends for the entire campus community, and a classroom hotline is available to call day, night or weekends for immediate assistance with classroom technology issues.

The IT department also maintains an online knowledge base for members of the campus community to research and resolve many technology issues without directly contacting Information Technology.

In addition to one-on-one training available from computing coordinators, the Information Technology Department offers regularly scheduled training classes on topics that include administrative information systems (Banner), email and calendaring platform (Google Apps), and general Microsoft Office usage. These classes are highly regarded and well-attended. In AY 15-16, IT offered154 classes and had 665 attendees. Although not principally directed at students, IT has recently begun allowing students to attend classes on subjects like Microsoft Office and Google Apps which were previously offered only to staff. Feedback from students has been positive.

### 2.G.7 Technological infrastructure planning provides opportunities for input from its technology support staff and constituencies who rely on technology for institutional operations, programs, and services.

Southern Oregon University has a representative body called the Technology Council, which serves to advise the chief information officer and the University's Executive Council on matters related to strategic technology planning, policy, and resource allocation. This body comprises four representatives from the faculty; a representative from each academic support division (Academic & Student Affairs, Finance & Administration, the chief information officer; and representatives from the library, Medford campus, Center for Instructional Support (CIS), Service Employees International Union (SEIU), and Associated Students of Southern Oregon University (ASSOU).

Every three years, the chief information officer and Information Technology Department develop a three-year strategic plan. The process begins by holding various informal discussions with campus stakeholders, including departments in Academic & Student Affairs, Finance & Administration, and SOU Foundation and Development; faculty; students; alumni; vendors; and our partners at Rogue Community College. The purpose of these meetings is to identify the critical technology strategies and policies required for programmatic success, technology trends, and technology strategies or policies requiring cross-campus planning, evaluation, and review. The information collected in these conversations is used to draft a three-year strategic technology plan. The plan is refined and endorsed by the Technology Council.

The Information Technology Department performs an annual satisfaction survey of all students, faculty, and staff. Students are asked about systems directly under control of the department as well as other services, such as SOU's learning management system, managed by other departments. This helps alleviate survey fatigue and gives the campus a broad-based view of all technology-related services. Likewise, faculty and staff are asked about a broad

range of services and systems up to the cleanliness of classrooms and labs since it helps shape the perceptions and gauges utility of those facilities.

The results of the annual survey are posted on the [Information Technology website](#) and announced through a campuswide email. Accompanying the announcement is a response that answers frequently asked questions and concerns from the survey results (making sure to preserve anonymity). By doing so, IT can address issues and topics that otherwise would not be possible given the anonymous nature of the survey.

Survey results are used in the deliberations of the Technology Council and in decision making by the Information Technology Department. Services have been added and changed as a direct response to survey comments and aggregate responses. Over the past four years, faculty and staff satisfaction with the department has gone from an average of 3.85 (slightly better than neutral) on a five-point scale to 4.28 (well above satisfied). Student satisfaction with IT services has also increased significantly, although not as dramatically.

Information Technology staff are directly involved in strategic and operational planning for the department. At least annually, staff and managers of the department participate in daylong planning exercises. These are opportunities to discuss and plan changes in services, processes, and technologies. During these exercises, teams are purposely split, and everyone is expected to contribute outside their own area of expertise. Additional project and operational planning is performed by each team during staff meetings and other activities.

**2.G.8 The institution develops, implements, and reviews regularly a technology update and replacement plan to ensure its technological infrastructure is adequate to support its operations, programs, and services.**

The Information Technology Department is responsible for the installation, maintenance, and replacement of the core networking, server, and data center infrastructure of the University. It regularly reviews the state of the University's infrastructure and engages IT staff, Technology Council, and the campus community in replacement planning. Systems, such as servers and storage area networks, are on a three- to five-year replacement cycle. Upgrade cycles for networking infrastructure are based on longevity, current performance, and need. Nearly all of the University's networking equipment is less than 10 years old, with nearly half of it having been replaced in the last four years. In contrast, the entire wireless networking infrastructure at SOU is less than four years old and sees significant expansion and replacement nearly every year (expanding from 65 access points to more than 500 access points across both campuses in less than four years). Data center facilities are upgraded as needed. In the past few years, this has included adding an uninterruptible power supply, upgrading to 10Gb networking, and installing a redundant core network switch.

Starting in 2013, a campuswide replacement and maintenance plan was enacted that provides for a four-year replacement cycle for faculty, staff, and lab/classroom computers. When the plan started, the average age of a campus computer was around eight years, with many

machines even older. We are nearly at the end of our first replacement cycle, which has meant replacing more than 300 computers per year. Faculty and staff are consulted on their replacement computer and given a choice between Mac or PC, desktop or laptop.

In addition, the Information Technology Department, through its computing coordinators, works directly with both administrative and academic departments to evaluate their current technologies, recommend replacements, and suggest new purchases. Instead of serving as a gatekeeper, IT acts as planner, consultant, and, in many cases, implementer of new systems and technologies.

With a shift to centralized scheduling of classrooms and labs, the Information Technology Department has begun planning for the regular upgrade and replacement of classroom technology (projectors, document cameras, control systems) throughout campus. Although IT's budget is limited, its goal is to upgrade at least two smart classrooms every academic year. That goal has been exceeded every year since 2011, which has been facilitated by building renovations that include funding for classroom technology replacement.

Partnering with the recently created Service Center, IT has centralized purchasing and management of copying, printing, and paper purchasing. Prior to this effort, departments and programs were responsible for managing their own copier contracts and toner and paper purchasing. As a result, the University was not only paying more for these services, but there was little coordination or support for these activities. After issuing Requests for Proposals, the University has selected vendors for each of these services, which reduces cost and decreases administrative overhead. For example, leasing a copier now just requires a purchase order instead of a full contract review. Early results suggest that these measures are effective in reducing expense and effort. Many departments and programs are already seeing significant savings on toner and paper as a result of centralizing these purchases. Within just a few months, nearly a quarter of all copiers on campus have been replaced and, it is expected that by the end of this process in several years, all copiers will be on a single coterminous contract and four-year replacement cycle.

On the Medford campus, many of IT's tasks are shared with personnel from Rogue Community College, with whom SOU co-owns the Higher Education Center. This includes replacement of classroom technology, shared computing facilities, and management of a data center. IT meets with its RCC counterparts on a monthly basis to discuss ongoing operations, issues, and replacement planning. Input is solicited from faculty, staff, and students of both institutions as we consider upgrades and changes to the services at the Higher Education Center. In recent years, the two institutions have collaborated to replace the wireless networking infrastructure, upgrade the building network, and implement a new network access control system.

Planning and replacement for shared Banner (and related information systems) infrastructure is a collaborative effort with SOU's partners in the University Shared Services Enterprise (USSE). Some of this work is in partnership with Oregon State University, which continues to host much of this shared infrastructure. With a process led by the manager of technical services at

the USSE, all of the participating campuses and the USSE's own technical staff are currently engaged in development of a multiyear plan to replace aging hardware and prepare for migration to Banner XE (the next generation of Banner). This represents a significant change from previous planning efforts, which only peripherally included input from the participating institutions. With the dissolution of the Oregon University System, the participating campuses have both a greater stake and say in how the shared infrastructure is planned, built, and maintained.

# Standard Three

*Institutional Planning*

## 3.A INSTITUTIONAL PLANNING

3.A.1 **The institution engages in ongoing, purposeful, systematic, integrated, and comprehensive planning that leads to fulfillment of its mission. Its plans are implemented and made available to appropriate constituencies.**

In recent years, Southern Oregon University has emphasized evidence-based decision making for both planning and assessment within all of its academic and support programs and new initiatives. For instance, new funds provided through the state legislature were recently designated for Student Success Initiatives and awarded based primarily on each proposal's projected return on investment as measured by improvements in academic success, retention, and degree completion. Funded proposals were required to show specific returns based on data generated by the Institutional Research (IR) and Budget & Planning Offices. To accommodate this requirement, we now deliberately code and constantly manage student data within our student information system. We analyze, for example, both program efficacy and potential success indicators of students enrolled in the newly established summer Bridge Program using a cohort coding scheme, which allows the IR Office to easily isolate and analyze this data.

Another example of purposeful and systematic planning is the associate vice president for academic resource management's continuous scrutiny of course section offerings. A new position at SOU, the associate vice president for academic resource management is responsible for monitoring current and historical section enrollments using a data warehouse reporting environment, which produces a more efficient array of new academic year offerings and the redeployment of faculty resources when current courses are canceled due to low attendance. Faculty advisors use the same data warehouse system for planning and analyzing their advisees' pathways to completion. The same data warehouse is used yet again by the professional advisors in the Academic Support Programs Office and our University Seminar faculty as they advise our new student populations (both first-years and transfers).

Other examples include a predictive analytics model that identifies student attributes associated with persistence, assigns each first-year student a retention probability, and outputs referrals to SOU Cares, the University's intervention reporting process. Additionally, dashboards for recruitment, enrollment, retention, degree completion, and general financial health of the Institution have been made available to the leadership and entire campus community to assist with program- and division-level planning.

The most comprehensive planning initiative undertaken in recent years was an institution-wide Program Prioritization Process conducted in 2013. This effort examined every program designated as consuming resources. A detailed and historical fact sheet was generated for each program, augmented by contextual narratives provided by the program's chair or coordinator. The process of producing this data and defining the subsequent program review was highly structured and thoroughly vetted in an effort to produce objective, understandable, and actionable decisions around how to prioritize all University operations.

Review teams comprising faculty, staff, and administrators evaluated program reports using the following criteria:

1. history, development, and expectations of the program
2. external demand for the program
3. internal demand for the program
4. quality of program inputs and processes
5. quality of program outcomes
6. size, scope, and productivity of the program
7. revenue and other resources generated
8. impact, justification, and overall essentiality of the program
9. opportunity analysis of the program

Reviews resulted in programs being assigned to quintiles, defined as follows:

Quintile 1: Enhance. Programs assigned to this category generally received high overall scores. Investment in these programs should be a priority to strengthen the academic performance of the University.

Quintile 2: Maintain and Possibly Enhance. Programs assigned to this category generally received medium to high overall program scores. Continued support of these programs at or above their current resource allocation is central to maintaining the academic performance of the University.

Quintile 3: Maintain. Programs assigned to this category generally received medium overall program scores. Continued support of these programs at or near their current resource allocation is central to maintaining the academic performance of the University.

Quintile 4: Review. Programs assigned to this category generally received medium to low program scores. Programs in this category contribute to the academic quality of the University, but curricular reorganization or resource reduction is required for long-term viability of these programs.

Quintile 5: Restructure. Programs assigned to this category generally received low program scores. Restructuring, consolidating, or eliminating these programs will permit the

redistribution of resources to targeted programs or enhance the academic performance of the University.

The Program Prioritization Process represented the beginning of regular and ongoing campuswide assessment, including both academic and academic support programs, with the intent to focus or refocus resources on the key elements of our mission: supporting student success, promoting intellectual growth, and encouraging responsible global citizenship. This process has cultivated a culture of evidence at SOU and emphasizes the expectation that program decisions, both now and in the future, be data-driven. Prudent stewardship of both public funds and student tuition money makes constant planning and assessment of University programs and departmental operations imperative. The final reports from this effort are included as appendices to this document. [Appendix 5.3 Academic Support Program Prioritization Report] [Appendix 5.4 Academic Program Prioritization Report]

At the institutional level, planning processes over the past seven years have included achievement compacts guided by the Oregon University System (OUS), Oregon Education Investment Board (OEIB), and Oregon State Board of Higher Education (OSBHE) (these have subsequently transitioned into the evaluation framework required by the Higher Education Coordinating Commission (HECC) as referenced below); Program Prioritization (2013); Capacity Study (2012); faculty workforce analysis (2012); Delaware Study (2013); and, ultimately, our retrenchment plan, which has largely served as the University's strategic plan for the past two years. In 2014, when the HECC was legislated, conditions governing the transition to and continuation of an independent board of trustees were articulated. The conditions for continued independent governance defined expectations around adherence to clearly defined metrics pertaining to enrollment, retention, and other aspects that have guided most planning and decisions. [Exhibit 3.A.1 Retrenchment Metric Tracking]

Planning at the individual academic program level is partially conducted via oversight of faculty loading and release under the purview of the associate vice president (AVP) for academic resource management. Among the academic planning efforts that have emerged from the University's careful attention to and emphasis on making the best use of available data, this oversight is executed through the collaborative efforts of program chairs, division directors, the AVP for academic resource management, and the provost. Informed by the annual course budget planner and faculty loading reports, program-level planning is guided by the broader context of University resource management.

The faculty loading report provides accounting of instructional and noninstructional workloads by assigning "equated load units" (ELUs) as they relate to the following faculty efforts:

- individualized instruction
- high instructional demand
- team teaching
- course development

- undergraduate advising
- graduate advising
- professional development activity
- grant work
- scholarly activity
- program chair duties
- coordination of undergraduate program
- coordination of graduate program
- other programmatic assignment
- governance duties
- other institutional assignment
- professional service
- community service

Planning processes and decision making in academic programs have been consistent with other areas of the University that differentiate broader and long-term planning from more specific and functional matters such as staffing, curriculum development, and resource management. The Biology Program, for example, describes their planning as "an ongoing process that responds to change in enrollment patterns, institutional funding, patterns in student demand, and post-graduation goals." In the absence of a strategic plan or master academic plan during the past several years of interim leadership, curricular planning has reflected the institutional priorities articulated in the 2014 retrenchment plan and, to some extent, priorities resulting from the transition to divisions—specifically, reconciling instructional and noninstructional faculty loading as well as adjusting staffing and class size to instructional needs. Much of the communication around institutional priorities originates from the provost via regular meetings with division directors and biweekly meetings of the Directors Council. Similarly, program planning and curriculum design often begin with feedback provided through annual assessment reports.

Planning within individual academic programs occurs over a variety of cycles within all divisions but at a minimum is done annually in all areas. Most academic programs hold an annual fall retreat focusing on curriculum, major requirements, assessment, and other program priorities and goals for the upcoming year. Programs such as Math, Psychology, and History & Political Science state that the function of their retreats is to establish priorities for the upcoming year and create opportunities to address concerns identified in the previous year's program assessment. Division directors generally convey information pertaining to larger institutional matters such as budget, faculty hiring, staffing, and faculty loading. The topic of assessment also features prominently in the fall retreat, both in terms of responding to feedback from the prior year and establishing plans and staffing for program assessment in the upcoming year.

Additionally, regular program meetings involving faculty and other personnel—and sometimes including other programs or entities such as division directors or other program chairs—take place at weekly, biweekly, or monthly intervals throughout the academic year. The School of Business, for example, states in its most recent annual report, "The planning process continues throughout the year. The faculty hold two-hour faculty meetings on the first and third Fridays of each month. Meeting minutes are kept and are distributed electronically to the faculty. The purpose is for the faculty to discuss goals, targets, and strategies for the upcoming academic year." These planning processes primarily feature input and participation from program faculty but may also include student voices, as is the case in the English Program, which uses student feedback to inform curriculum adjustments.

Planning within academic programs also involves interdisciplinary collaboration at SOU. In its latest annual report, the History Program notes, "When changes impact other academic programs on campus, the chair consults with those programs. In recent years, for example, History has consulted closely with Education to ensure that appropriate course offerings are available for SOU undergraduates who seek to pursue an MAT with a concentration in social studies teaching. History also coordinates closely with Extended Campus Programs because of its significant Advanced Southern Credit offerings." Another example is the Political Science Program, which developed tracks or concentrations within their major in close association with the outcomes of civic engagement and political philosophy, each track "requiring curation of faculty across programs." Program faculty also serve on institution-wide committees that govern curricular, assessment, and academic policy decisions, including Faculty Senate, the Academic Policies Committee, and the University Assessment Committee, which facilitates coordinated and informed planning of annual assessment needs. Programs such as Clinical Mental Health Counseling and Health & Physical Education engage with academic support entities like the Student Health & Wellness Center, student government, and Center for Instructional Support to inform the planning of their program.

Several programs, including Business, the Honors College, and Environmental Science & Policy, meet with external advisory bodies or councils on which community members, stakeholders, local area employers, and others serve and contribute to planning. For instance, the Honors College states the following in their annual report: "The Honors College Advisory Council (HCAC) is composed of SOU faculty, staff, students, and community partners [and] takes an active role in reviewing and updating the HC curriculum and the process of including new/additional faculty to teach HC courses. Although assessment of HC student achievement will always remain the purview of each respective HC instructor, the HCAC will provide guidance and suggestions to HC faculty regarding assessment and evaluation of student achievement of program-learning outcomes. HCAC minutes will be recorded by the HC office specialist, available to all HC students, HCAC members, HC faculty (not serving on the HCAC), SOU administrators, and SOU Board members." Similarly, the Native American Studies (NAS) Program reports that it aims to "develop an NAS advisory board made up of diverse constituents to advise the program on curricular and noncurricular needs and also to advocate on behalf of the program to larger constituencies. We are drafting an outreach letter and

survey for regional Native American tribes and organizations to identify their needs and perspectives." The University Library is somewhat unique in that its planning connects directly with the feedback gleaned from all programs and students via the interactions recorded at various service points, including Reference, Circulation, Periodicals, and Special Collections Archives.

All of these programmatic planning processes roll up into institutional planning. Gathering this input and engaging internal University faculty and staff, as well as external stakeholders, ensure that SOU is connected to the appropriate resources to enable broad, ongoing, and systematic annual planning.

### 3.A.2 **The institution's comprehensive planning process is broad-based and offers opportunities for input by appropriate constituencies.**

Many campus groups and appropriate constituencies enjoy an opportunity for input in planning, with the most obvious being the executive leadership teams. From the top down, these include the Board of Trustees, the Executive Cabinet, the Provost's Advisory Council, Finance & Administration's Business Affairs Council, the Directors Council, and the Faculty and Student Senates. SOU also convenes a University Planning Board, Student Affairs Council, Enrollment Council, Technology Council, and Student Success Committee. All of these groups review or advise on an array of plans, initiatives, and general operational decisions. Additionally, SOU works closely with the statewide Provosts Council and Higher Education Coordinating Commission, which is responsible for advising the Oregon legislature, governor, and Chief Education Office on higher education policy issues and institutional vitality. As noted previously, conditions have been attached to the continuation of an independent board of trustees at SOU. These conditions require in part that the HECC receive regular and thorough reports from SOU on all aspects of the Institution, with particular focus on financial data, enrollment data, and mission definition.

### 3.A.3 **The institution's comprehensive planning process is informed by the collection of appropriately defined data that are analyzed and used to evaluate fulfillment of its mission.**

Data gathering and analysis at Southern Oregon University has expanded dramatically within the last decade. Over the past few years, a clear commitment to data-driven and informed decision making has evolved, most recently expanding even further due to the information needs of our newly seated Board of Trustees. Additionally, the creation of an Office of Institutional Research (IR) in 2009 consolidated all IR responsibilities, whereas these were previously carried out via a committee approach that was neither efficient nor particularly effective.

The new Board of Trustees was established upon the dissolution of the Oregon University System, a process that also included dissolving the OUS IR Office, whose responsibilities

included providing the bulk of data analysis and reporting to state, federal, and legislative constituencies. Now that SOU is independent, we rely exclusively on internal reporting for these needs. Toward that end, the Institutional Research Office, Budget & Planning Office, Provost's Office, and Financial Services provide a wide range of data analyses, both separately and collaboratively, using warehoused data, as well as base data from University information systems. These data provide SOU's executive leadership, the Board of Trustees, and other internal advisory councils with reporting and analyses of direct concern to the University's operation.

The suite of reports and analyses include:

- weekly detail enrollment reporting
- weekly admissions funnel reporting
- quarterly financial management reporting
- recruiter's territory management reporting
- retrenchment metric reporting
- achievement compacts and an evaluation framework data set
- retention and graduation rate reporting
- predictive analytic analyses
- NSSE and CLA results
- program planning and assessment reporting
- enrollment projection modeling
- SOU Cares and Financial Cares reporting
- conditions reporting to the State of Oregon's Higher Education Coordinating Commission

Planning is further informed by annual assessment reviews (both academic and academic support), and ongoing enrollment counts, faculty loading, instructional capacity, and student and advisee censuses. At the division level, planning usually revolves around data from these same sources, but the data are rolled up to the division level and analyzed for different outcomes (e.g., division-wide allocation of FTE, release time, adjunct hiring, faculty replacements). The academic restructuring created divisions and division directors; accordingly, Deans Council has been replaced by Directors Council, which is designed to be a far more collaborative and equitable decision making environment, given that directors oversee academic units of roughly the same FTE and are jointly involved in decision making that reflects institutional priorities rather than individual college or school needs.

The implementation of TracDat to record and track program-level outcomes, their means of assessment, and the results of those assessments has yielded significant data and planning resources at both the individual program and institutional levels. The reports produced from

this effort also provide the individual units with both a comprehensive plan for the program, as well as information about how that plan is or is not meeting expectations.

The system also identifies the extent to which the University's core themes are integrated into, or addressed by, the outcomes defined within each program (see 3.B.3). Over the last four years, both academic and support programs have been focusing their outcomes planning on the core themes associated with our mission. Theme Mapping reports show exactly how programs' outcomes map to the defined themes and a larger institutional snapshot of which themes are more commonly assessed and/or addressed, and by which programs and areas. [Exhibit 4.B.1 Acad Program Outcomes and Themes]  For support programs, we have developed an extension of the core themes relating directly to the academic themes but slanted toward student service and support functions. [Exhibit 4.B.1 Acad Support Program Outcomes and Themes] This allows administrative departments to align outcomes with themes geared toward nonacademic programming and activities but to simultaneously integrate and serve the University's core themes.

A key feature of TracDat is the recording of "actions" or "followups" that program coordinators or assessment personnel identify. This "fourth column" of the four-column assessment report—which includes outcomes, means of assessments, results, and actions/followups—provides a structure for programmatic feedback into each subsequent year's planning process [Appendix 4.1 Four-Column Assessment Reports for Academic Programs].

Faculty and staff engagement in these planning opportunities spans the academic divisions and administrative offices. Given the University's size, however, participation in these processes is sometimes limited to two or three individuals (often a program coordinator, chair, or staff member designated to manage assessment). To provide more occasions for input into assessment and planning, SOU schedules a number of annual retreats, during which all academic program coordinators and many program chairs and faculty share plans and learn of overall assessment progress. The retreat agendas always include the presentation of exemplar programs' assessment and planning strategies as well as additional training on TracDat software and tips on how it can be further leveraged by program coordinators. These retreats offer a general review of programs' annual reports and serve as a conduit for feedback, which informs the development of future plans.

### 3.A.4 The institution's comprehensive plan articulates priorities and guides decisions on resource allocation and application of institutional capacity.

SOU's last strategic plan expired in 2014, which coincided with the declaration of retrenchment, creation of the HECC, transition to an institutional board, and two years of an interim presidency. While undertaking strategic planning under such conditions clearly poses significant challenges, internal planning processes that informed decision making going into and throughout retrenchment (including the 2013 Prioritization Study and 2012 Capacity Study) were both collaborative and systematic. Additionally, the Chancellor's Office provided

resources such as the workforce productivity study (using data based on the national Delaware cost study model). This breadth of data and focus on strategic reinvestment—rather than simply reduction of courses/faculty and an increase in fund balance—positioned the retrenchment plan as a functional strategic plan that was not designed to change the essential character of SOU as an institution, but that would provide the opportunity to refocus institutional priorities and recalibrate our mission.

### 3.A.5 The institution's planning includes emergency preparedness and contingency planning for continuity and recovery of operations should catastrophic events significantly interrupt normal institutional operations.

Southern Oregon University is committed to enhancing the safety of students, faculty, staff, and visitors to campus. As part of this commitment, the University has established a comprehensive [Emergency Management Program](#) led by the director of campus public safety. The activities of this program include management, coordination, and support of the development and planning of the University's Emergency Operations and Natural Hazard Mitigation plans. The program also organizes emergency management training for faculty, staff, and students and is responsible for our mass notification systems. In times of emergency, this program manages University operations and response.

Outside SOU, the Emergency Management Program communicates, collaborates, and trains with our emergency management partners, which include the City of Ashland, Ashland Fire & Rescue, Ashland Police Department, Ashland School District, Jackson County, Jackson County Sheriff's Department, local health departments, Medford Police Department, and Rogue Community College. Some recent collaborations include shadowing an emergency management exercise at the City of Ashland, advanced emergency management training at the Jackson County Sheriff's Office, and a multiday higher-education–specific training event in Redding, California. Ongoing development of these relationships allows a coordinated response to better meet the needs of our campus community.

The Emergency Operations Plan (EOP) guides the University's response to both natural and human-made disasters. In the event of a crisis, it is SOU's goal to restore services and function as quickly as possible while maintaining a safe environment for the campus community. The EOP addresses the four major phases of disaster management: preparedness, response, recovery, and mitigation. This plan encompasses the [Basic Emergency Operations Plan](#) along with an [Infectious Disease Annex](#), [Crisis Communication Annex](#), and [Mass & Timely Notification Annex.](#) The EOP uses the Federal Emergency Management Agency's (FEMA) Incident Command System (ICS), following national standards for interoperability between multiple agencies and levels of governmental response.

The Emergency Management Program is supported by the University's Crisis Management Team (CMT). This team comprises 17 professionals drawn from multiple departments across campus, including Facilities Management & Planning, Human Resource Services, Information

Technology, Marketing & Communications, Student Affairs, Student Health & Wellness, and University Housing. All members of the team are required to be certified in the ICS. Meeting regularly, the team assists with all aspects of the University's Emergency Management Program. When an emergency is declared, the normal University administrative organization is temporarily restructured to efficiently mobilize campuswide resources with the Crisis Management Team, filling restructured roles under the ICS. During the emergency, the CMT reports to both the incident commander and SOU executive leadership and is responsible for:

- directing overall operations;
- organizing, staffing, and operating the Emergency Operations Center;
- operating communications and warning systems;
- providing information and guidance to the campus community;
- maintaining information on the status of resources, services, and operations;
- obtaining support for the University and providing support to nearby jurisdictions as required;
- analyzing hazards and recommending appropriate safety measures;
- collecting, evaluating, and disseminating damage assessment and other essential data; and
- providing reports to emergency management partners.

The Emergency Management Program periodically conducts live training exercises, bringing together the Crisis Management Team, executive leadership, and community partners. These exercises have included active shooter, major chemical spill, dam break, and wildfire scenarios. Our most recent exercise was also used by local police departments as a training opportunity for their officers, lending additional realism to the scenario.

Southern Oregon University has developed a Natural Hazard Mitigation Plan (NHMP) to reduce its risk from natural hazards by identifying resources, information, and strategies for risk reduction. Although it is impossible to predict when disasters might occur or the extent to which they may affect the campus, the NHMP helps guide and coordinate mitigation activities that can reduce losses from natural hazards. SOU's NHMP was submitted for and received approval from FEMA, permitting the University to apply for certain emergency management and mitigation grants. In summer 2016, nine members of the CMT participated in a three-day L0363 Multi-Hazard Emergency Management for Higher Education conducted by FEMA. A comprehensive risk assessment model was produced as part of this training to further assist with planning for and managing risks to the Institution.

In support of the Emergency Management Program and to address additional electronic threats to campus operations, the Information Technology Department has developed technology-related Disaster Recovery and Incident Response plans. The IT Department is also actively engaged in mitigation efforts, currently completing a secondary site at the University's Medford campus and adding redundancy for some services through cloud-based providers.

When the secondary site is completed, it is expected that all University technology operations could be conducted indefinitely from the Medford campus. SOU's IT Department is also collaborating on disaster recovery plans with its partners in the University Shared Services Enterprise, which hosts the enterprise resource systems (Ellucian Banner) of all four Oregon technical and regional universities. We expect the completion of a disaster recovery plan by the end of this year.

The University has deployed SOU Alert, a mass notification system for all faculty, staff, and students. The system is capable of simultaneously delivering messages by email, text message, voice call, and social media, including Facebook and Twitter. All employees and students are automatically enrolled in the system with their University-supplied email address and their home of record or work telephone number. Campus members are also encouraged to add their mobile phone number to their SOU Alert account. This system is used regularly for weather-related and emergency notifications.

To supplement the mass notification system, SOU is currently installing a public address system on the Ashland campus. This new system can be activated from anywhere and includes loudspeakers at strategic locations throughout the campus.

The Institution has prepared an [Emergency Procedure Manual](#) detailing campus safety, emergency management, and the health and welfare of our campus community. It includes information on and reviews response procedures for possible emergencies that may occur at SOU. Faculty, staff, and students are encouraged to become familiar with these procedures and review the manual throughout the year.

# EXECUTIVE SUMMARY OF ELIGIBILITY REQUIREMENTS 22 AND 23

Eligibility Requirement 22: Student Achievement

**The institution identifies and publishes the expected learning outcomes for each of its degree and certificate programs. The institution engages in regular and ongoing assessment to validate student achievement of these learning outcomes.**

Learning outcomes are identified and reported each year by all academic programs in an annual assessment report. Most programs also articulate these for individual courses or programmatically on their websites or within advising materials. Annual assessment reports are submitted and reviewed by the University Assessment Committee (UAC), which evaluates program outcomes, areas for improvement, and degree to which improvements are being made. Summaries are created and shared with program chairs and assessment personnel.

Eligibility Requirement 23: Institutional Effectiveness

**The institution systematically applies clearly defined evaluation and planning procedures, assesses the extent to which it achieves its mission and core themes, uses the results of assessment to effect institutional improvement, and periodically publishes the results to its constituencies. Through these processes, it regularly monitors its internal and external environments to determine how and to what degree changing circumstances may impact the institution and its ability to ensure its viability and sustainability.**

As demonstrated in Standards Three, Four, and Five of the present report, Southern Oregon University engages in ongoing and systematic assessment of its academic and academic support programs, analysis of the degree to which core themes are being met, and efficacy in applying learning from this assessment to planning and improvement efforts. Through these and other processes, internal and external environments are monitored and, when necessary, practices are assessed and adjusted in response. University administrative personnel provide regular and comprehensive updates to the Board of Trustees.

# 3.B CORE THEME PLANNING

3.B.1 **Planning for each core theme is consistent with the institution's comprehensive plan and guides the selection of programs and services to ensure they are aligned with and contribute to accomplishment of the core theme's objectives.**

Each of the three core themes is a student learning outcome that articulates an aspect of the University's mission. Accordingly, Standards 3.B, 4.A, and 4.B are addressed for each core theme as well as collectively in each of the corresponding sections below.

Our first theme, student success, reflects the expectation that our students develop the intellectual and practical skills needed for "personally rewarding vocations and satisfying personal lives." This theme is expressed in indicators that focus on fundamental skills: communication, collaboration, critical thinking, and responsible and ethical information literacy. Planning to assess the achievement of these indicators occurs largely within academic programs and in university-wide assessment of the indicators that have been identified for each. Within the theme of student success, four objectives guide planning and mission alignment:

1. Communicate effectively using Standard American English in written and oral communication
2. Collaborate with others to achieve a common goal
3. Use critical and creative thinking to solve abstract and applied problems
4. Access and use information resources effectively and ethically

As outlined elsewhere in this report (see Standard 4.A.1), academic programs engage in annual assessment of the extent to which their programs contribute to the achievement of these objectives within both their individual programs and the specific courses that support general education curriculum. Results of these outcomes inform planning for curriculum changes and course planning; faculty assignment and hiring; and allocation of resources such as faculty ELUs and alternative instructional assignments (such as overseeing capstones, individual instruction, internships, and practica). Planning for growth, elimination, or reduction of programs can also be informed by these results, as can some aspects of faculty professional development, tenure, and promotion.

Student success is also a primary driver of planning in nonacademic programs, particularly in the areas of Student Life, Student Support & Intervention, SOU Housing & Dining, Athletics, and the many cocurricular and support activities these entities plan and implement each year. For example, Student Life programming features a wide array of leadership development, social support, and collaborative skills within its cocurricular offerings, including the First Year Mentor Program, Week of Welcome, tradition weeks, Alternative Spring Breaks, and the many student worker positions that support and complement the work of our staff. As presented in the tables below, both academic and nonacademic programs are now required to demonstrate on an annual basis the extent to which their planning and programming integrate and achieve core theme objectives.

The second theme, intellectual growth, articulates SOU's commitment to providing opportunities to gain foundational understanding of primary disciplines as well as to extend and refine that knowledge beyond basic understanding. It expresses the expectation that our faculty be competent, attuned to new developments, and prepared to impart knowledge that defines their disciplines and that they challenge students to extend and apply those understandings. Planning for this core theme is expressed in:

- curricular decisions that reflect the priority we place on achievement of objectives in this area (Core Theme 2.1)
- faculty planning processes and evaluations that foreground disciplinary currency and professional development around the knowledge and skills that operationalize the objectives within this core theme (Core Themes 2.1 and 2.2)

Our third core theme, responsible citizenship, establishes the expectation that students develop the skills and disposition to apply their learning to larger contexts—local, national, and global—and that they be committed to using their education as a catalyst for change and ethical behavior. It also encompasses the expectation that the University will prepare students to negotiate diversity and express cultural competence in both thought and action. Planning related to this theme focuses developing opportunities for students to gain experiences in practical settings within the framework of learning outcomes as well as the provision of opportunities to encounter worldviews, ethical frameworks, and value systems differing from their own. These are expressed in academic and support programming that require monitoring, engagement in, and responsiveness to broader contexts, such as capstones, practica, internships, and career development; Student Life's Environmental & Engagement programming, leadership activities, and resource center programming; Honors and Bridge Program; and the Career Connections Office (Core Themes 3.1 and 3.2).

3.B.2 Planning for core theme programs and services guides the selection of contributing components of those programs and services to ensure they are aligned with and contribute to achievement of the goals or intended outcomes of the respective programs and services.

For academic programs, it can be difficult if not impossible to separate noncurricular planning from curricular planning (which relates specifically to core themes), particularly during a time when budget and other resource-related matters are primary considerations. The Capacity Study, Program Prioritization Process, retrenchment, academic reorganization, and transition to a board of trustees combined with changes at the state level have resulted in greater integration of curricular and noncurricular planning for programs, particularly around resources and faculty workload. However, retrenchment and other key institutional processes are assessed against mission and core theme fulfillment which achieves integration of individual program outcomes and services and with larger institutional goals. The Institution now also requires support programs to directly map their objectives and assessments to the established core themes wherever possible. To a significant extent, this is handled directly within the areas (e.g., Student Life, SOU Housing, Academic Support Programs, and Student Support & Intervention). To a lesser extent, support areas like Enrollment Services and Admissions map to other themes that are closely tied to the main academic core themes of student success, intellectual growth, and responsible citizenship.

3.B.3 **Core theme planning is informed by the collection of appropriately defined data that are analyzed and used to evaluate accomplishment of core theme objectives. Planning for programs and services is informed by the collection of appropriately defined**

**data that are used to evaluate achievement of the goals or intended outcomes of those programs and services.**

The table below delineates the mapping of program outcomes to each of the University's academic core themes and shows both the total number of outcomes related to a theme and the number of programs that map at least one of their outcomes to a given theme.

*Table 1: Academic Core Themes*

| Academic Core Themes | Outcomes Mapped | Programs Represented |
|---|---|---|
| CT 1.1/Strand A – Communicate effectively using Standard American English in written and oral communication. | 188 | 45 |
| CT 1.2 – Collaborate with others to achieve a common goal. | 134 | 41 |
| CT 1.3/Strand B – Use critical and creative thinking to solve abstract and applied problems. | 218 | 46 |
| CT 1.4/Strand C – Access and use information resources effectively and ethically (information literacy). | 132 | 47 |
| Strand D – Demonstrate the knowledge required to effectively formulate and use mathematical models and procedures to address abstract and applied problems. | 20 | 9 |
| CT 2.1/Strands E, F, G – Extend knowledge of human cultures and the physical and natural world through the study of the arts & humanities, social sciences, and sciences. | 113 | 39 |
| CT 2.2/Strand H – Integrate and apply advanced knowledge and skills in one (or more) specialized area(s) of study. | 181 | 41 |

| | | |
|---|---|---|
| CT 3.1/Strand I – Apply knowledge, skills, and ethical inquiry to practical problems locally and globally. | 194 | 43 |
| CT 3.2/Strand J – Understand and respond responsibly to worldviews and cultural practices different from one's own. | 148 | 40 |

For the first time, in academic year 2014–15, academic support programs (all programs that are not academic, including administrative, auxiliaries, support services, and infrastructure) conducted self-studies that reflected academic assessment processes and mapped closely to the specific operations of these 76 programs as well as the core themes. Each academic support program's assessment report was evaluated by a committee comprising eight administrators from Enrollment Services, Admissions, University Library, Finance & Administration, Institutional Research, the Provost's Office, and Facilities Management & Planning.

The first year's results were uneven: some programs struggled to define clear outcomes, assessment activities, and appropriate means of measuring outcomes largely because they had not been required to do so before. Others had already gathered data for external constituencies or their own internal planning processes and needed to refocus their assessment activities toward institutional priorities and themes. For example, the TRiO and McNair Programs report assessments to their external funding agencies that are clearly not aligned with our themes. Exemplary programs include the Queer Resource Center, Student Support & Intervention, and Jefferson Public Radio. These programs were able to articulate clear outcomes, means of assessment, and data collection, which also informed their ability to apply results to future planning. These and other model programs were invited to share their processes and approaches to core-theme planning during semiannual retreats organized by the director of university assessment, along with the director of institutional research and accreditation liaison officer (ALO). These retreats also focused on writing outcomes, identifying indicators, and achieving mastery of TracDat, as well as improvement for the next year. Annual program reports for 2015-16 had been collected, but not assessed at the time that this report was finalized.

*Table 2: Academic Support Program Themes*

| Support Program Themes | Outcomes Mapped | Programs Represented |
|---|---|---|
| Advocate exceptional customer service. | 236 | 57 |
| Comply with external regulations. | 142 | 44 |
| Efficiently manage program. | 259 | 56 |
| Engage students. | 249 | 59 |
| Foster inclusive community. | 174 | 49 |
| Promote health, safety, and security. | 145 | 43 |
| Promote widespread student outreach. | 149 | 49 |
| Academic Program Themes Used by Support Programs | | |
| CT1.1/Strand A: Student Success – Communicate effectively. | 97 | 34 |
| CT 1.2/Student Success – Collaborate with others. | 152 | 44 |
| CT 1.3/Strand B: Student Success – Use critical and creative thinking. | 68 | 30 |
| CT 1.4/Strand C: Student Success – Access and use information resources effectively and ethically (information literacy). | 67 | 29 |
| Strand D – Formulate and use mathematical models and procedures. | 12 | 9 |

| | | |
|---|---|---|
| CT 2.1/Strand E, F, G: Intellectual Growth – Extend knowledge of human cultures and the physical and natural world. | 54 | 23 |
| Academic Program Themes Used by Support Programs | | |
| CT 2.2/Strand H: Intellectual Growth – Integrate and apply advanced knowledge and skills in one (or more) specialized area(s) of study. | 52 | 26 |
| CT 3.1/Strand I: Responsible Citizenship – Apply knowledge, skills, and ethical inquiry. | 95 | 32 |
| CT 3.2/Strand J: Responsible Citizenship – Understand and respond responsibly to worldviews and cultural practices different from one's own. | 89 | 34 |

# Standard Four

*Effectiveness and Improvement*

## 4.A ASSESSMENT

4.A.1 **The institution engages in ongoing systematic collection and analysis of meaningful, assessable, and verifiable data—quantitative and/or qualitative, as appropriate to its indicators of achievement—as the basis for evaluating the accomplishment of its core theme objectives.**

### Institutional Assessment

Although program assessment has always existed at SOU, it has taken a variety of forms. A systematic, data-based approach to tracking and recording all programmatic outcomes and their assessments became routinized with the purchase and adoption of a Nuventive software product called TracDat, which was implemented in academic year 2011–12. Academic programs began using the platform to capture assessment data in fall 2012, while academic support programs followed in fall 2014.

With TracDat, academic programs can enter their learning outcomes and means of assessment; tie their outcomes to institutional themes; map courses to each outcome; track results; and detail the actions to be taken when and if those results were less than expected. Support programs also use the software to track their own operational outcomes and demonstrate alignment with institutional themes. The director of university assessment and director of institutional research have both provided significant support to all programs throughout the adoption and implementation of this software.

### Academic Programs

Since the 2012–13 academic year, the Faculty Senate committee known as the University Assessment Committee (UAC) has been requesting that each academic program submit an annual assessment report each spring. [Exhibit 4.A.1 2014–15 Academic Program Report Template] Once submitted, the report is then reviewed by members of the UAC and evaluated using a rubric. [Exhibit 4.A.1 2014–15 Academic Program Review Evaluation] Committee members first review reports and supporting information posted in TracDat individually, then norm their results together. Their joint analysis is captured via an online survey tool that not only provides an overall snapshot of how the program is doing in these areas but also offers the opportunity to gauge how closely each program's self-analysis aligns with the reviewers' evaluations and to identify areas where improvement is needed. The aggregated results of these reviews are also available via the survey software to perform specific analyses as needed.

At the end of the review process, the UAC assesses overall results and identifies areas in which programs are meeting requirements as well as those in which work is still needed. Trends and needs are noted and, where possible, are addressed during the academic programs' quarterly assessment retreats. The feedback from each academic program's review is communicated to the program chair or coordinator and other assessment personnel in a meeting with the director of university assessment. This submission and review process has continued on an annual basis for three consecutive years, although it was revised in the 2015–16 academic year, when all academic programs were asked to respond specifically to the NWCCU standards in preparation for Year Seven Accreditation Reporting. [Exhibit 4.A.1 2015–16 Academic Program Self-Study Guide]

The programmatic self-studies include a report generated by TracDat that pulls each program's outcomes, their means of assessment, the results of those assessments, and any actions taken as related to those results into a standard, four-column assessment report. These reports have been collected into Appendix 4.1 Four-Column Assessment Reports for Academic Programs.

## Academic Support Programs

During the 2014–15 academic year, the director of university assessment and director of institutional research began the process of working with all support programs to define their self-determined programmatic outcomes and enter assessment data in TracDat during quarterly assessment retreats. At the end of the fiscal year on June 30, all support programs were asked to submit an assessment report. [Exhibit 4.A.1 2015–16 Support Program Report Template] The reports were reviewed by a newly formed Support Programs Assessment Review Committee, which includes the associate provost, director of institutional research, director of university assessment, and representatives of various support programs. Each support program and program supervisor received feedback from the reports after they were reviewed using a rubric specific to support programs. [Exhibit 4.A.1 2015–16 Support Program Review Evaluation] The support programs also submitted an annual assessment report again in summer 2016. Review and evaluation of Support Program assessment reports follows the same general process as the academic programs: Assessment Review Committee members each review and score reports individually, then norm findings in pairs, after which results and feedback are prepared and provided to programs and supervisors.

## Core Themes & Indicators (CTI)

The core themes guide the overarching goals of the University. Objectives and indicators are assessed at several levels: academic programs, program curricula, specific courses and assessments, and cocurricular and engagement opportunities. Collectively, these core themes and indicators are intended to evaluate benchmarks that determine whether the Institution is attaining its mission and how the different components (academic, nonacademic, and operational) contribute to mission fulfillment. Data provided in this section present the work

done in academic programs to support learning, apply measurement, and seek improvement toward core theme fulfillment.

### Standard 4.A.1 – CTI 1.1.1

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 1 | Communicate effectively using Standard American English in written and oral communication. |
| Indicator 1 | Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education (written). |

Indicator Status: Target partially met.

Core Theme 1.1 articulates the expectation of proficiency in written and oral communication.

Ongoing university-wide written communication assessment activities are carried out both in individual programs and as part of the work of the University Assessment Committee. The UAC also coordinates the Collegiate Learning Assessment (CLA), which provides SOU with a value-added measure of its seniors' higher-order thinking skills. Performance is then reported in relation to all other institutions participating in the CLA. It was administered starting in 2009 and offered for a final time in 2016 after a gap in administration in 2014 and 2015. In 2013, the committee decided to also assess senior writing more directly by conducting university-wide assessment of capstone papers or other senior writing samples. A pilot study evaluating senior writing was performed in 2012–13; complete studies occurred during the 2013–14 and 2014–15 years and will now continue annually. Administered in fall 2015 and spring 2016, the CLA was included as an external check.

The CLA total score below is based on two components: a performance task and analytical writing task. The writing task is further divided into two parts: making an argument and critiquing an argument. The first indicator for this core theme is based on the total CLA scores and, although the total score conflates writing and critical thinking, the following results are worth noting. From 2008 to 2013, SOU ranked high compared to other institutions in higher-order thinking and writing skills.

| Value-Added Percentile Ranks | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 2008–09 | 2009–10 | 2010–11 | 2011–12 | 2012–13 | 2013–14 | 2014–15 | 2015–16 (CLA+) |
| Total CLA Score | 86 | 77 | 89 | 98 | 90 | No | No | 33 |

| | | | | | admin | admin | |
|---|---|---|---|---|---|---|---|
| 1. Performance Task | N/A | 82 | 84 | 98 | 94 | No admin | No admin | 8 |

"N/A" indicates there were not enough students with both CLA scores and/or an Entering Academic Ability (EAA) value to compute a result.

It should also be noted the CLA analyses take the results from all CLA institutions into consideration, regardless of sample size or sampling strategy. Therefore, caution should be used when interpreting results, especially if testing included small samplings of students or if students in the sample are not representative of the larger student body. In the past, value-added models were recalculated after each academic year, which allowed for a potential fluctuation in results due to changes in the sample of participating institutions rather than changes in actual growth within a college or university. The introduction of CLA+ marks the first time value-added equation parameters will be fixed. This procedure will facilitate reliable year-to year comparisons of value-added scores for CLA+ institutions.

The 2015–16 results (see below) marked a drop in performance task measures, a significant change from the previous administration. However, the instrument administered for this academic year was also significantly different, which also affects results. The revised CLA+ instrument no longer reports on the value-added gains specifically within the sub-skills of the performance task, and the task itself has changed, which makes it difficult to compare value-added gains from year to year.



In the table above, SOU was given the overall classification of "near." Value-added scores are placed on a standardized scale and assigned performance levels. These scores are also known as "z-scores" because they relate performance to the mean, or average. The categories for value-added scores are: above +2.00: "well above expected"; +2.00 to +1.00: "above expected"; +1.00 to –1.00: "near expected"; -1.00 to -2.00: "below expected"; below -2.00: "well below expected".

Value-added scores are also accompanied by confidence intervals, which provide details about the precision of the estimates.

In the 2016 assessment, SOU's scores place our students in the middle range for observed performance versus expected performance. CLA results indicate SOU students performed better than 41% of the CLA+ schools. However, a "large" margin of error and changes made to the instrument (particularly the performance task data) strongly suggest this 41% is not directly comparable to our previous CLA scores. Testing administrators provide a conversion measure which, when applied, generated a revised score placing us in the 51st percentile for AY 2012–13.

Additionally, CLA requires SAT or ACT scores from all test subjects to generate a full analysis of predictability and assess estimates of value-added gain, a benchmark we identified as the indicator in Core Theme 1.1. However, only 84 first-year students and 60 seniors contributed to the analysis results, due to absent SAT and ACT scores. This is to be expected given SOU's relatively large transfer student population, a group for whom SAT/ACT scores are encouraged, but not required. During the most recent administration of the CLA, 9 of the 60 seniors were transfers for whom we had SAT/ACT scores, but this ratio (9/60 or 15%) is unrepresentative of SOU seniors as evidenced by the historical ratio of senior transfers to total seniors (currently 986/1437 or 69%). Therefore, it is within this context that the results of the CLA are interpreted.

Our seniors average at the level of "Proficient," the middle category. Our first-year students averaged "Basic," one level below. Our students showed no improvement on the Performance Task: Analysis & Problem Solving; Writing Effectiveness; and Writing Mechanics, but they did improve on the Selected-Response Questions: Scientific & Quantitative Reasoning; Critical Reading & Evaluation; and Critiquing an Argument.

On the self-report of effort expended on the exam, first-year students put more effort into the performance tasks than seniors. As many as 72% of first-year students indicated they put either "a lot of effort" or "my best effort" into the performance task elements, while 53% of seniors reported in those categories. On the selected response questions, 33% of first-year students characterized their efforts in the top two categories, as opposed to 40% of the seniors. It should be noted that the timing and modality of exam administration likely affected these reports. First-year students took the assessment as part of their first-year seminar, in their class cohort, and early in the term when they were new to the Institution. The exam was administered to seniors in spring quarter, a time during which many seniors experience the combined pressure of their capstone and other aspects of their degree completion and graduation. Seniors received monetary incentive to take the CLA, while first-year students took the exam as a required course activity, which may explain the effort reported.

## Standard 4.A.1 – CTI 1.1.2

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
| --- | --- |
| Objective 1 | Communicate effectively using Standard American English in written and oral communication. |
| Indicator 2 | Random sampling of exiting seniors' writing samples will indicate 70% of students meet or exceed senior-level writing proficiencies as defined by an institutional writing rubric. |

Indicator Status: Target not met

Development and assessment of student writing proficiency begins during the first-year University Seminar and culminates in the senior writing goals, an SOU requirement that dates back before 1990. The current Catalog describes writing proficiency as follows:

Demonstrate writing and research skills within the academic field of study chosen as a major. This upper division requirement is in addition to the University Studies writing requirement. It is met through coursework in the major that is designed to encourage the use of professional literature.

Students who have achieved the writing and research goals will be able to:

1. systematically identify, locate, and select information and professional literature in both print and electronic formats within the knowledge base of the specific discipline;
2. critically evaluate such materials;
3. use the materials in a way that demonstrates understanding and synthesis of the subject matter; and
4. develop cohesive research papers that use data and professional literature as evidence to support an argument or thesis following the style and conventions within the discipline of the major.

The University Assessment Committee has developed rubrics and is assessing student work for the foundational goals of written communication, critical thinking, and information literacy, which began in the 2013–14 year. The UAC uses a rubric based on the AAC&U value rubrics to score student work.

During the 2013–14 and 2014–15 academic years, the UAC collected previous academic year senior writing samples from all majors on campus. Teams of two from the UAC scored a stratified random sample of senior writing. Each team member reviewed and scored assigned papers individually before meeting to norm and reach consensus on a final score for each paper; the final scores were then compiled in an online results instrument using Qualtrics.

During the 2015–16 academic year, the UAC also began examining Quantitative Reasoning (Strand D) as part of the review of senior-level writing. The committee initiated the use of an Oral Communication rubric, which was piloted during first-year and senior-level presentations.

The University Assessment Committee's evaluations of senior writing using an institutional rubric [Exhibit 4.A.1 Institutional Senior Writing Rubric] have resulted in a substantive summary report for both 2013–14 [Exhibit 4.A.1 2014–15 Senior Writing Assessment Summary] and [Exhibit 4.A.1 2013–14 Senior Writing Assessment Summary]. The following graphs summarize the data.



Comparison of the Standards - 2014



Comparison of the Standards - 2015
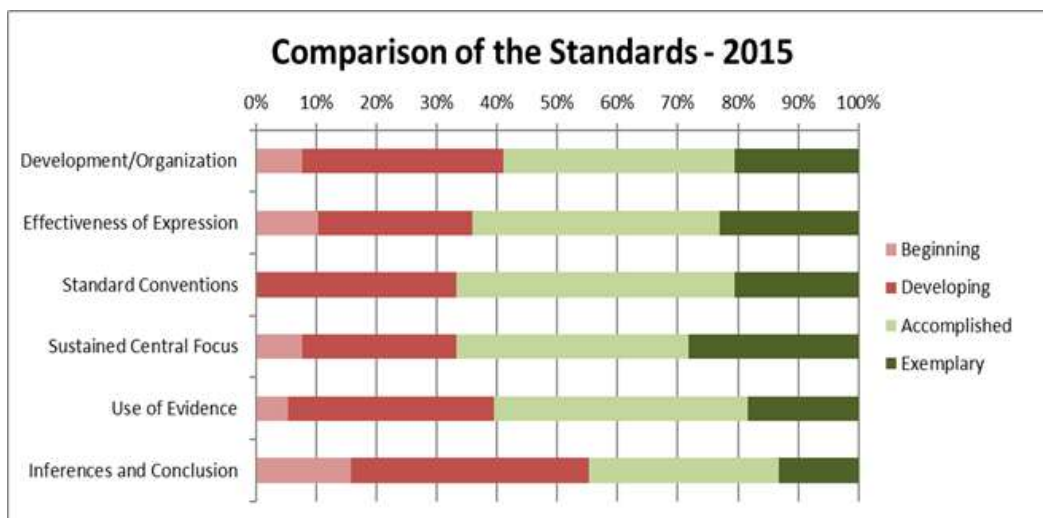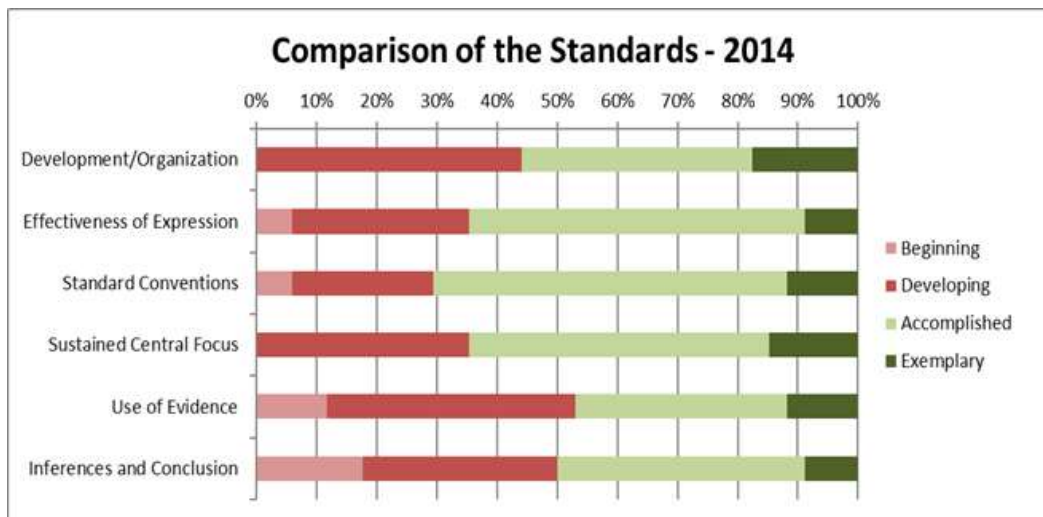
UAC defines senior writing proficiency as either "accomplished" or "exemplary" (the green portions of the bars on the graphs). Writing, which is rated according to the first three row topics, is mostly above 60% proficiency, but SOU has not met its writing proficiency goals of 70%.

Results of the senior writing evaluations are presented at the UAC's spring Assessment Workshop (one of three Assessment Retreats/Workshops held by the committee each year). The reports are also submitted to Faculty Senate as part of the committee's year-end report. Since this process began, several programs have adapted the institutional rubric for their own purposes and have implemented their own programmatic, formal senior writing assessments.

Southern Oregon University also assesses its first-year students' writing skills. New students take University Seminar (USEM) classes during their first year. This three-term sequence of courses is designed to "develop analytic, communication, quantitative, and information skills while introducing [students] to the expectations of university study." The students write a diagnostic essay in their first week and also write to the same prompt at the end of their first year. USEM faculty analyze these results. At the end of the year, first-year students research and write a Freshman University Seminar Essay (FUSE) on a fixed topic. These are graded by their instructors but are also included as part of a random blind sample that is assessed by a team of USEM instructors under the guidance of the director of university assessment. Part of USEM instructional loading is allocated to assessment tasks, which also includes professional development for assessment skills. The FUSE is graded according to the same rubric as senior writing.

## Senior Writing vs. FUSE
### A Matched Pair Writing Assessment Study

Effective communication is further assessed by analysis of first-year and senior writing via comparison of writing proficiency at the completion of University Seminar and senior capstone writing. Specifically, the assessment seeks to measure the value-added gain that should exist between a first-year student's writing competency and that same student's senior writing skills. This matched pair analysis involves comparing first-year writing samples from the Final University Seminar Essays (FUSE) with writing samples taken from the same student's senior capstone project.

In the most recent comparative analysis between these students' first-year writing and their senior writing ($n$=64), there was a statistically significant difference within 9 of the 12 rubric components assessed within the first-year writing ($2.1 <= M <= 2.8$, $0.72 <= SD <= 0.93$) and senior writing ($2.7 <= M <= 3.2$, $0.7 <= SD <= 1.1$). Therefore, we can reject the statement that there is no difference in scores between the students' writing but instead, using the Cohen's effect size calculation ($0.5 <= d <= 0.8$), can state there is indeed a moderate to high significance in effect between these samples.

For the study, the Division of Undergraduate Studies identified 106 students who had submitted senior writing samples in spring 2014 to the UAC and who had completed University Seminar first-year writing. The Final University Seminar Essays (FUSE) papers were located for 78 of those 106 students. Of the 78 papers collected, 64 senior writing samples were available

for analysis in this study. The 14 senior writing samples not assessed included music scores, non-English papers, and computer science coding.

In fall 2015, 18 University Seminar instructors participated in a norming exercise using three FUSE essays and two senior writing samples. All instructors involved in the assessment currently teach the entire one-year University Seminar sequence. Of the 18 participating instructors, 9 were adjuncts, 3 were one-year faculty hires, and 6 were full-time faculty.

The norming process began with a group discussion about a FUSE and senior writing paper (one of each) that had been distributed prior to the two-hour meeting in relation to the Institutional Writing Rubric. Once the discussion was completed, a norming packet was distributed to each participant. Each faculty member assessed the samples and submitted scores a week later. Once the norming scores were collected, each instructor received a packet containing 10 writing samples for the final assessment. The FUSE and senior writing papers were not identified as such, allowing for blind scoring. This scoring process entailed using the writing rubric, which contains 12 dimensions organized into three categories (Written Communication, Critical Thinking, and Information Literacy) and employs four levels of competency within each dimension (1 – Beginning; 2 – Developing; 3 – Exemplary; and 4 – Accomplished). Results of each student's freshmen and senior writing assessments were then paired back up and evaluated for any statistically significant differences.

*Results*

Aggregated results of the 64 student writing samples are shown in Tables 1 and 2 below. The FUSE results are displayed in Table 1, and the senior writing results in Table 2. Table 3 shows the score distribution per measure; their means and standard deviations; an effect size calculation; and a significance test called the Wilcoxon signed-rank test, an alternative to traditional ANOVA significance tests used for potentially non-normal data distributions. In all 12 dimensions within the rubric, the mean scores for senior writing were higher than those for the first-year FUSE writing. The effect size calculation indicates there is a moderate to large effect in the first two dimensions of the Written Communication category (content development/organization and effectiveness of expression) as well as in all three dimensions of the Critical Thinking category (sustained central focus, evidence, and valid inferences/clear conclusions). Additionally, three dimensions within the Information Literacy category ("recognizes the necessity to cite appropriate sources"; "incorporates high-quality and discipline-appropriate or peer-reviewed sources"; and "integrates a range of sources such as books, articles, government documents, and websites that are appropriate for the subject matter") also showed a moderate to large effect. The Wilcoxon signed-rank test indicated all of the component scores of the senior writing samples were statistically significant in comparison with those of the first-year FUSE scores. Three dimensions within the Information Literacy category ("cites sources in a complete and consistent format"; "distinguishes timeliness of

sources are current unless of historical significance"; and "chooses sources relevant to the subject matter"), however, all showed low significance.

Clearly, all the students participating in the study became better writers between their first and senior years, especially within the categories of Written Communication and Critical Thinking. We are also examining ways we can use this study to better measure the value-added gains. For example, using capstone projects as the basis for senior-level writing potentially introduced nonrepresentative samples due to the elimination of certain capstone projects. In addition, only FUSE papers submitted during spring term are retained, which limited the paired matching opportunities. This challenge resulted in a new procedure in which all FUSE papers are now being stored from all academic year quarters, potentially providing larger $n$ values in future pairings. We are also considering the value of comparing SOU's senior writing assessments with other external and exemplary writing samples as a way of benchmarking SOU's results. Finally, some additional work will need to be done to isolate assessments around the category of Information Literacy. This area demonstrated less value-added gains than all the dimensions within the categories of Written Communication and Critical Thinking.

## Table 1

| FUSE | Written Communication | | | Critical Thinking | | | Information Literacy | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Content development and organization of ideas | Effectiveness of expression | Standard conventions of grammar, punctuation, mechanics and spelling | Sustained central focus | Evidence | Valid inferences and clear conclusion | Recognizes the necessity to cite appropriate sources | Cites sources in a complete and consistent format | Distinguishes timeliness of sources - current unless of historical significance | Chooses sources relevant to subject matter | Incorporates high quality, discipline-appropriate or peer reviewed sources | Integrates range of sources - books, articles, gov docs, websites - appropriate for subject matter |
| 1 - Beginning | 9 | 7 | 4 | 7 | 8 | 11 | 13 | 10 | 7 | 3 | 16 | 14 |
| 2 - Developing | 33 | 30 | 23 | 29 | 32 | 29 | 27 | 26 | 29 | 20 | 27 | 33 |
| 3 - Accomplished | 16 | 22 | 27 | 20 | 22 | 21 | 19 | 25 | 21 | 29 | 14 | 13 |
| 4 - Exemplary | 6 | 5 | 10 | 8 | 2 | 3 | 5 | 3 | 7 | 12 | 7 | 4 |

Histograms: Content, Eff Expr, Conventions, Focus, Evidence, Inference, Appr Sources, Compl Sources, Curr Sources, Relvnt Sources, Quality Sources, Rnge Sources

## Table 2
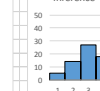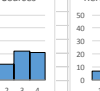
| SR Writing | Written Communication | | | Critical Thinking | | | Information Literacy | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Content development and organization of ideas | Effectiveness of expression | Standard conventions of grammar, punctuation, mechanics and spelling | Sustained central focus | Evidence | Valid inferences and clear conclusion | Recognizes the necessity to cite appropriate sources | Cites sources in a complete and consistent format | Distinguishes timeliness of sources - current unless of historical significance | Chooses sources relevant to subject matter | Incorporates high quality, discipline-appropriate or peer reviewed sources | Integrates range of sources - books, articles, gov docs, websites - appropriate for subject matter |
| 1 - Beginning | 6 | 5 | 0 | 4 | 6 | 5 | 10 | 12 | 9 | 7 | 13 | 15 |
| 2 - Developing | 12 | 9 | 13 | 10 | 13 | 14 | 9 | 12 | 12 | 5 | 13 | 13 |
| 3 - Accomplished | 21 | 26 | 30 | 23 | 25 | 27 | 21 | 21 | 22 | 23 | 16 | 18 |
| 4 - Exemplary | 25 | 24 | 21 | 27 | 20 | 18 | 24 | 19 | 21 | 29 | 22 | 18 |

Histograms: Content, Eff Expr, Conventions, Focus, Evidence, Inference, Appr Sources, Compl Sources, Curr Sources, Relvnt Sources, Quality Sources, Rnge Sources

## Table 3

| | Written Communication | | | Critical Thinking | | | Information Literacy | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Content development and organization of ideas | Effectiveness of expression | Standard conventions of grammar, punctuation, mechanics and spelling | Sustained central focus | Evidence | Valid inferences and clear conclusion | Recognizes the necessity to cite appropriate sources | Cites sources in a complete and consistent format | Distinguishes timeliness of sources - current unless of historical significance | Chooses sources relevant to subject matter | Incorporates high quality, discipline-appropriate or peer reviewed sources | Integrates range of sources - books, articles, gov docs, websites - appropriate for subject matter |
| FUSE Mean | 2.297 | 2.391 | 2.672 | 2.453 | 2.281 | 2.250 | 2.250 | 2.328 | 2.438 | 2.781 | 2.188 | 2.109 |
| FUSE Std Dev | 0.823 | 0.783 | 0.811 | 0.846 | 0.717 | 0.791 | 0.866 | 0.792 | 0.827 | 0.800 | 0.933 | 0.812 |
| SR WR Mean | 3.016 | 3.078 | 3.125 | 3.141 | 2.922 | 2.906 | 2.922 | 2.734 | 2.859 | 3.156 | 2.734 | 2.609 |
| SR WR Std Dev | 0.976 | 0.907 | 0.718 | 0.899 | 0.940 | 0.896 | 1.065 | 1.079 | 1.029 | 0.972 | 1.135 | 1.127 |
| Mean Difference | 0.719 | 0.688 | 0.453 | 0.688 | 0.641 | 0.656 | 0.672 | 0.406 | 0.422 | 0.375 | 0.547 | 0.500 |
| effect size* | 0.796 | 0.812 | 0.592 | 0.787 | 0.766 | 0.776 | 0.692 | 0.429 | 0.452 | 0.421 | 0.526 | 0.509 |
| Wilcoxon signed-rank test (V=) | 211 | 156 | 122 | 187 | 141 | 197 | 247 | 350 | 326 | 387 | 338 | 264 |
| p-value | 0.0000400 | 0.0000400 | 0.0005300 | 0.0000600 | 0.0000600 | 0.0001000 | 0.0001890 | 0.0188500 | 0.0163900 | 0.0331500 | 0.0030440 | 0.0057410 |

*effect size values close to 1.0 = large effect, near 0.5 = moderate effect, and near 0.2 = weak effect and is calculated as: (Mean of SR Wr-Mean of FUSE) / SQRT((StDev of FUSE^2+StDev of SR WR^2)/2)

indicates a moderate - large effect of senior writing vs. FUSE scores

indicates SR WR scores are statistically significant vs. FUSE scores

Student progress from the end of their first year to their senior year is summarized in the following graphs.
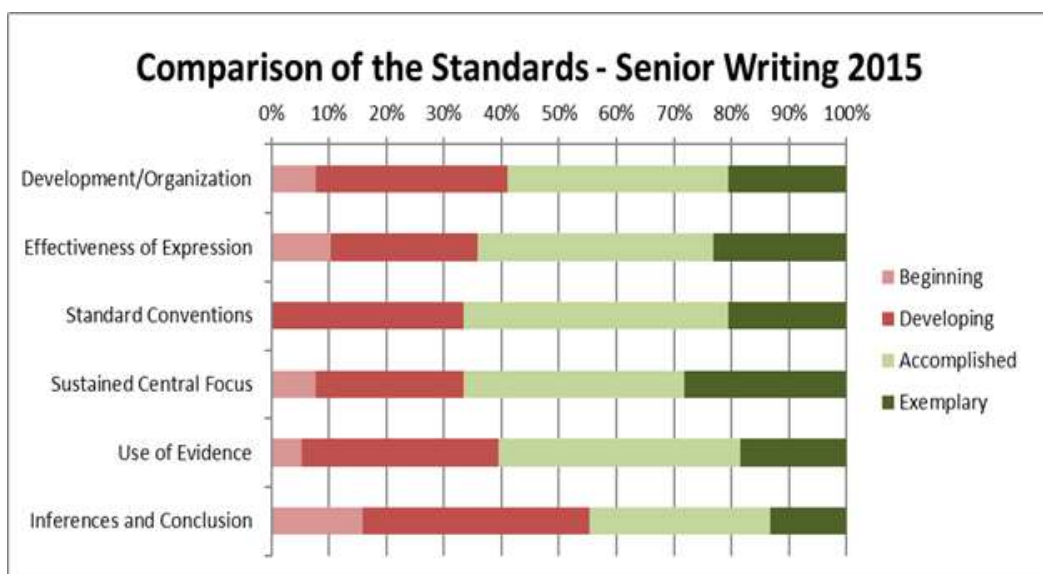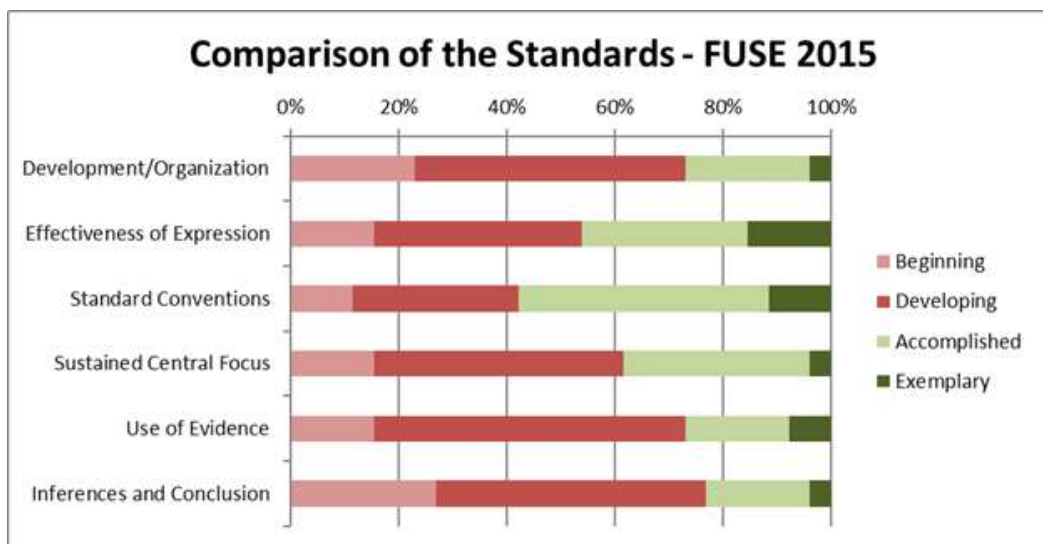




*Assessment of Writing Within Academic Programs*

In addition to the writing skills components of the USEM curriculum and activities, the UAC's analysis of senior writing, and the comparative analysis undertaken by UAC, individual academic programs also conduct their own assessment of writing and research skills. In the 2015–16 assessment cycle, 83% of academic programs identified writing skills as explicit outcomes as measured by a survey of their TracDat reports. About 40% of the programs have evaluated these skills as a program and have posted results in TracDat.

Notable changes have been made because of program assessment of writing. Outdoor Adventure Leadership added a scientific writing component to its OAL 425 Biology course

after analysis of its midpoint writing assessment recommended the elimination of team writing. [Exhibit 4.A.1 OAL 2015 Annual Report] Art reorganized its first-year programs to better prepare its prospective majors for their artist's statement applications. Anthropology (merged with Sociology in the new Sociology & Anthropology (SOAN) Program as of AY 2015–16) has all faculty assess all senior capstone papers annually. [Exhibit 4.A.1 SOAN 2015 Annual Report] As a result, the program split its capstone prompts into parts so the students could identify and understand different intended outcomes. Military Science, based on their assessment of senior-level writing, hired an outside writing instructor and recorded improvements. [Exhibit 4.A.1 MS 2015 Annual Report]

Several programs noted greater emphasis on professional skills career preparation in writing assessment. Psychology now requires a professional portfolio of each of its majors, [Exhibit 4.A.1 PSY 2015 Annual Report] while Business created BA 324 Business Communication, a core requirement based on its assessment of student writing. [Exhibit 4.A.1 BUS 2015 Annual Report] Among several other recent curricular changes made by English was a revision of Writing 414 Advanced Composition to Writing for Publication to improve their students' writing skills. [Exhibit 4.A.1 ENG 2015 Annual Report]

Many other programs across campus have recorded plans to review student writing in TracDat, where they also document progress.

## Standard 4.A.1 – CTI 1.1.3

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 1 | Communicate effectively using Standard American English in written and oral communication. |
| Indicator 3 | Students will self-report the number of opportunities to practice writing on NSSE (NSSE Benchmark: Level of Academic Challenge (LAC)), and results will be consistent with or exceed 2009 findings. |

Indicator Status: Target met.

The indirect measure for this objective is defined by NSSE's assessment of the Level of Academic Challenge (LAC) experienced by students. There are four categories within this LAC theme: Higher-Order Learning, Reflective & Integrative Learning, Learning Strategies, and Quantitative Reasoning. Components within the Learning Strategies category align with the indicator of this core theme's indirect measure, specifically the strategy related to students' opportunities to practice writing.

In 2009, NSSE measured this component using the following options: i) more than 20 pages, ii) between 5 and 19 pages, and iii) fewer than 5 pages. That year, 10% of the first-year students reported they produced more than 20 pages of writing per week while 47% of seniors reported this. More recently, the NSSE changed this question's options to the following: i) more than 11 pages, ii) between 6 and 10 pages, and iii) 5 or fewer pages. Our 2014 results for writing opportunities indicate 42% of SOU's first-year students generated more than 11 pages of writing per week (the choice with the most number of pages per week), while seniors reported 65% for this option. Although the number of pages within these options changed between the 2009 and the 2014 survey administrations, it should be noted that the large upward shifts (a 10% to 42% increase for first-year students and a 47% to 65% increase for seniors) that have taken place over the last five years indicate this component of the Level of Academic Challenge experienced by our students has improved markedly.

Indicator Status: Target met.

### Standard 4.A.1 – CTI 1.1.4

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 1 | Communicate effectively using Standard American English in written and oral communication. |
| Indicator 4 | As demonstrated within their senior capstone project, 70% of students will meet or exceed senior-level oral communication proficiencies as defined by institutional rubrics. |

Indicator Status: Target not met

In addition to individual program assessment activities around oral communication in academic year 2015–16, UAC initiated an oral communication embedded assessment similar to its written communication, critical thinking, and information literacy assessment. The committee developed a new rubric [Exhibit 4.A.1 Institutional Oral Communication Rubric] with the intent of measuring the oral communication proficiencies of students presenting in venues such as programs' capstone events, University Seminar class presentations, and the annual Southern Oregon Arts and Research (SOAR) event at which seniors and other students address audiences drawn from both campus and the larger community.

UAC committee members interviewed programs to find out where and when senior presentations occurred and then went through a norming exercise facilitated by the director of university assessment. Teams attended program presentations, including those at SOAR and in USEM classes, to test the rubric and gather data that may eventually be used to assess the value-added gain in oral communication proficiency from first to senior year. The committee's

goal is to have a process in place for the following year and each succeeding year. Students' oral communication proficiencies can then be measured and compared to institutional goals. Interestingly, one of the committee members was in Guanajuato, Mexico, coordinating SOU's Master in Management cooperative program and used the committee's oral presentation rubric to assess the students. The rubric was well-received, and we now have a useful set of data [Exhibit 4.A.1 MiM GTO Capstone Presentations] for master's students. As discussed below, the committee also intends for individual programs to adopt or adapt its rubric in the same way as the written communication, critical thinking, and information literacy rubrics.

### *Standard 4.A.1 – CTI 1.1.5*

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 1 | Communicate effectively using Standard American English in written and oral communication. |
| Indicator 5 | As part of each program review, programs will define, design, and identify their embedded assessments to determine the degree of students' success at communicating effectively. Programs establish their criteria, gather the data, and prescribe actions necessary when criteria are not met. |

Indicator Status: Target partially met

According to a survey of assessment reports submitted to TracDat in 2016, 73% of programs identify oral communication skills as explicit outcomes, but only 28% of the programs have measured these skills. Notable examples are Foreign Languages, which recently adopted the American Council on the Teaching of Foreign Languages (ACTFL) oral communication rubric to better assess its students' oral communication skills; Psychology, which uses poster presentations for oral communication; Mathematics, whose faculty attend capstone presentations and rate students using a rubric; and Outdoor Adventure Leadership, which compares oral communication year by year to gauge their students' increasing skills. UAC and SOU's director of institutional assessment will continue to work with programs to develop embedded assessments that gauge proficiency in oral communication.

### Standard 4.A.1 – CTI 1.2.1

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
| --- | --- |
| Objective 2 | Collaborate with others to achieve a common goal. |
| Indicator 1 | The continuous development of collaborative skills will be assessed in the first-year seminar and at the exit point using a performance task and institutional rubric adopted by the AAC&U. |

Indicator Status: Target partially met

While many programs' coursework components and other activities such as practica, community-based learning, and civic engagement activities enable students to engage in collaborative efforts, programs have not yet completed a comprehensive review of collaboration skills, either on their own or under the leadership of the University Assessment Committee. According to information reported by academic programs in their 2015–16 self-studies, fewer than 10% of our programs have program outcomes directly related to collaboration, identify specific courses associated with those outcomes, or formally assess collaboration as a separate criterion. Programs cite peer review and group work as evidence of collaboration skills, but few formally assess their students' progress in this domain. With the exception of the Honors College, none of the programs assess progress using the performance task and institutional rubric adopted by the AAC&U.

In many programs, collaboration is not explicitly identified as a discrete objective. The outcomes programs link to the collaboration theme appear to support the development of collaboration skills but are not specifically written to address or measure proficiency in collaboration. These skills include interpersonal, group, and institutional communication; teamwork and group work; group problem solving; self-awareness; empathy; leadership; community engagement; collective action; and open-mindedness.

Thirty-eight percent of academic programs have identified at least one program outcome related to the collaboration theme. These programs include Art; Biology; Business; Chemistry; Creative Writing; Criminology & Criminal Justice; Elementary Education; Emerging Media & Digital Arts; English; Environmental Science & Policy; Gender, Sexuality, & Women's Studies; Honors; Music; Sociology & Anthropology; and Theatre Arts. Five programs do currently focus on evaluating their students' progress in collaboration. These programs have specific courses associated with the related program outcome and formally assess collaboration as a distinct outcome.

## BUSINESS

All business majors participate in a business simulation game in which they collaborate and compete with others, and their performance is compared against other participants (undergraduate and graduate students) across the nation. Played in BA 427: Business Strategy and Policy, the Business Strategy Game is a core requirement in the undergraduate business major. Over the last year, the Business Strategy Game has been used by 46,235 students in 2,495 classes/sections at 564 college/university campus locations in 51 different countries. Students from SOU consistently rank in the top 100. Between 2011 and 2013, multiple SOU business teams were listed in several Global Top 100 rankings, including a Number 1 ranking overall in spring 2015.

## ENVIRONMENTAL SCIENCE & POLICY (ESP)

Collaboration is currently assessed in Capstone and several other courses in the context of the program's civic engagement outcome. The program is developing a standard rubric to be used in the 2016–17 academic year to assess collaboration between students or measure collaboration between students and community stakeholders.

## GENDER, SEXUALITY, & WOMEN'S STUDIES (GSWS)

Collaboration skills are measured using the program learning outcome "Activist Skill 2: Students will demonstrate an ability to do collaborative work and to network with others." Faculty serving on the GSWS Assessment Committee use a rubric that includes an assessment of collaboration to measure the capstone or practicum. [Exhibit 4.A.1 Gender Women's Studies GSWS 410 Final Paper Rubric]

## SOCIOLOGY & ANTHROPOLOGY (SOAN)

The Sociology & Anthropology Program encourages ethical practice and civic engagement throughout the curriculum. Senior capstone work is evaluated against SOAN's ethical dispositions rubric [Exhibit 4.A.1 SocAnth Outcomes Rubric Analytic Skills-Knowledge-Dispositions], which specifically measures students' ability to collaboratively work in community contexts. As with past work in Sociology & Anthropology, these rubric scores are summarized and compared to our assessment criterion. The program intends to track changes in these scores over time.

## HONORS

In HON 490, the Honors College Capstone required of all HC students, assignments and corresponding assessments align with course learning outcomes, including collaboration, which is measured using AAC&U's Teamwork Value Rubrics. By assessing the students' collaboration skills in their freshman year (HON 101, 102, and 103) and again in their senior year

(HON 490), changes that occurred in these students' collaboration skill competencies between their freshman and senior years can be identified and evaluated.

### *Standard 4.A.1 – CTI 1.2.2*

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 2 | Collaborate with others to achieve a common goal. |
| Indicator 2 | Students will self-report the number of opportunities to collaborate on NSSE (NSSE Benchmark: Active and Collaborative Learning (ACL)) and results will be consistent with or exceed 2009 findings. |

Indicator Status: Target partially met

The indirect measure for this objective is defined by NSSE's Active and Collaborative Learning (ACL) theme as reported by both first-year and senior students. In 2009, the NSSE had two main categories related to this ACL theme: Collaborative Learning and Discussions with Diverse Others. Questions within the Collaborative Learning category align well with the indicator of this core theme's indirect measure. Specifically, these questions include:

i.   Worked with other students on projects during class.
ii.  Worked with classmates outside of class to prepare assignments.

Results from the 2009 data show that, on average, 46% of first-year students either worked "often" or "very often" with others students on projects that occurred in class or out of class. Among seniors, the average for the same measure in these categories was reported at 53%. In 2014, NSSE changed these items slightly on the survey but retained two pertinent questions related to collaborative learning:

i.   Prepared for exams by discussing or working through course material with other students.
ii.  Worked with other students on course projects or assignments.

Results from that 2014 data show, on average, 56% of the first-year students reported working "often" or "very often" with others on projects that occurred either in or out of class. In 2014, 49% of seniors reported these levels of collaboration. It is clear that opportunities for first-year students to work collaboratively together improved (10% increase), while seniors indicated these opportunities were either not taken or possibly not offered as frequently between 2009 and 2014.

## *Standard 4.A.1 – CTI 1.3.1*

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 3 | Use critical and creative thinking to solve abstract and applied problems. |
| Indicator 1 | Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education (critical thinking). |

Indicator Status: Partially met

SOU recognizes the importance of critical thinking skills for its graduating students. Since 2009, the University has been monitoring seniors' critical thinking skills using the CLA and via a senior writing assessment since 2013. The CLA results are summarized in the following two tables, which demonstrate that SOU has done well by the value-added comparative measures of the CLA assessment, notwithstanding the limitations of the CLA noted above in Standard 4.A.1, CTI 1.1.1.

| Value-Added Percentile Ranks | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 2008–09 | 2009–10 | 2010–11 | 2011–12 | 2012–13 | 2013–14 | 2014–15 | 2015–16 (CLA+) |
| Total CLA Score | 86 | 77 | 89 | 98 | 90 | No admin | No admin | 33 |
| 2.2. Analytical Writing Task | N/A | 74 | 84 | 86 | 59 | No admin | No admin | 78 |
| 1.1 Make an Argument | N/A | 52 | 71 | 92 | 79 | No admin | No admin | Not avail in CLA+ |
| 1.2 Critique an Argument | N/A | 90 | 91 | 70 | 33 | No admin | No admin | Not avail in CLA+ |

"N/A" indicates there were not enough students with both CLA scores and/or an Entering Academic Ability value (EAA) to compute a result.

## *Standard 4.A.1 – CTI 1.3.2*

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 3 | Use critical and creative thinking to solve abstract and applied problems. |
| Indicator 2 | 70% of graduating students meet or exceed senior-level critical thinking proficiencies as defined by an institutional rubric derived from the AAC&U critical thinking rubric. |

Indicator Status: Target not met

As previously noted, the University Assessment Committee determined in 2012 that an assessment based on seniors' graded work would provide more useful data than the CLA. Subsequently, the committee devised the senior writing assessment process that began in the 2013–14 and 2014–15 academic years and will continue annually. The following two graphs (the last three rows) summarize the results on critical thinking.



Comparison of the Standards - 2014

**Comparison of the Standards - 2015**
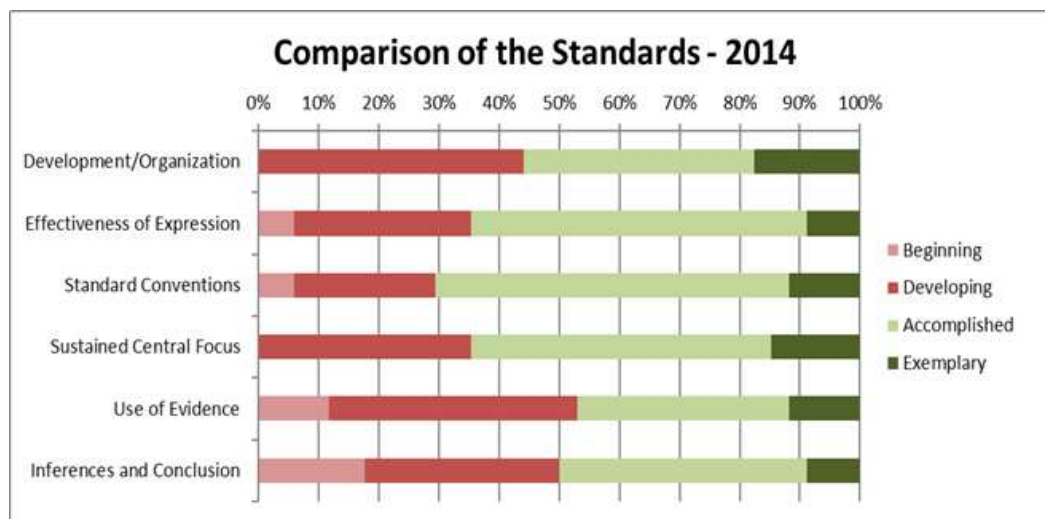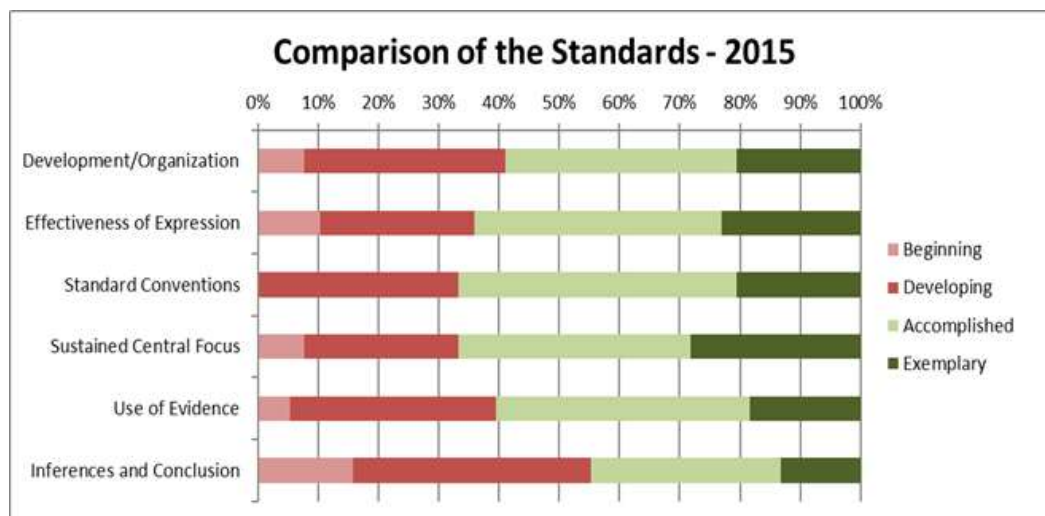
The UAC defines senior proficiency as either accomplished or exemplary (the green portions of the bars on the graphs). Critical thinking is rated according to the last three row topics. Generally, roughly 65% of seniors are proficient in sustaining a central focus, 50–60% are proficient at using evidence, and 45–50% are proficient at inferences and making specific conclusions. As can be seen, SOU has not met its critical thinking proficiency goals of 70%.

For the 2014–15 assessment, quantitative reasoning (QR) assessment was added. For its initial assessment, the UAC was interested in the potential for QR "naturally" occurring in senior papers versus the actual integration of quantitative reasoning as way of introducing evidence, developing an argument, and sustaining a thesis. This graph shows nearly 60% of the papers would have benefited from the use of QR.



**Potential for Including QR: Senior Papers - 2015**

Total number of papers rated is 39.
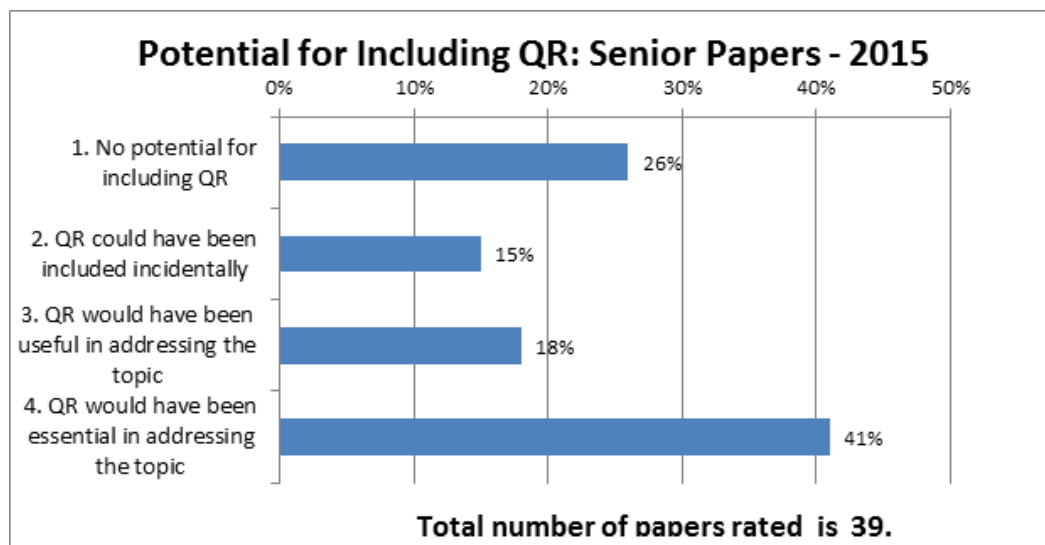
For those papers that included QR, over 50% were proficient according to the rubric.
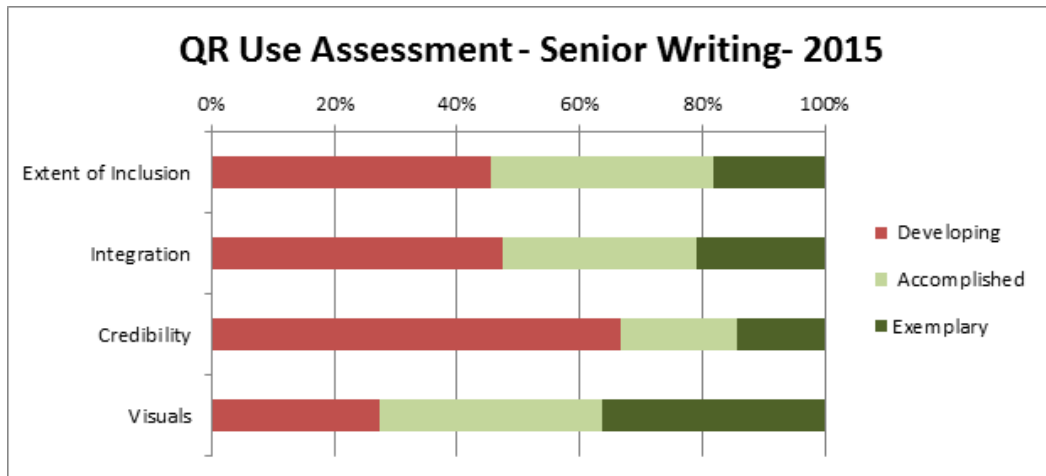
The "beginning" category is missing because of the differing interpretations applied by the teams during their assessments.

UAC presented this data at its spring Assessment Workshop to discuss next steps. The same information was gathered for the first-year University Seminar FUSE papers. Seventy-seven percent did or could have used QR, and the students were much weaker in QR skills. Details can be found in the report. [Exhibit 4.A.1 2014–15 Senior Writing Assessment Summary]

The FUSE is evaluated using the same rubric as senior writing and likewise includes the critical thinking component. A comparison was performed between FUSE exams and the same students' graduating senior papers gathered during the UAC's senior writing evaluations. An effect size of around .77 was found for all three categories of critical thinking, indicating the education provided at SOU improves students' critical thinking proficiencies.

In addition, the University Assessment Committee, as part of its senior writing assessment process, also assessed a sample of FUSE papers to gauge students' progress from the end of their first year to their senior year. This progress is evident in the following graphs.
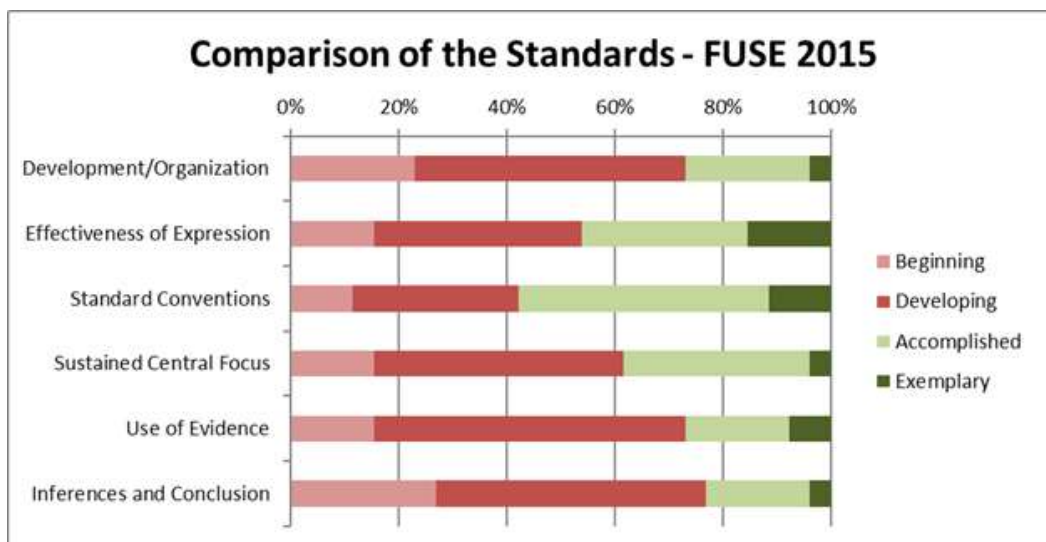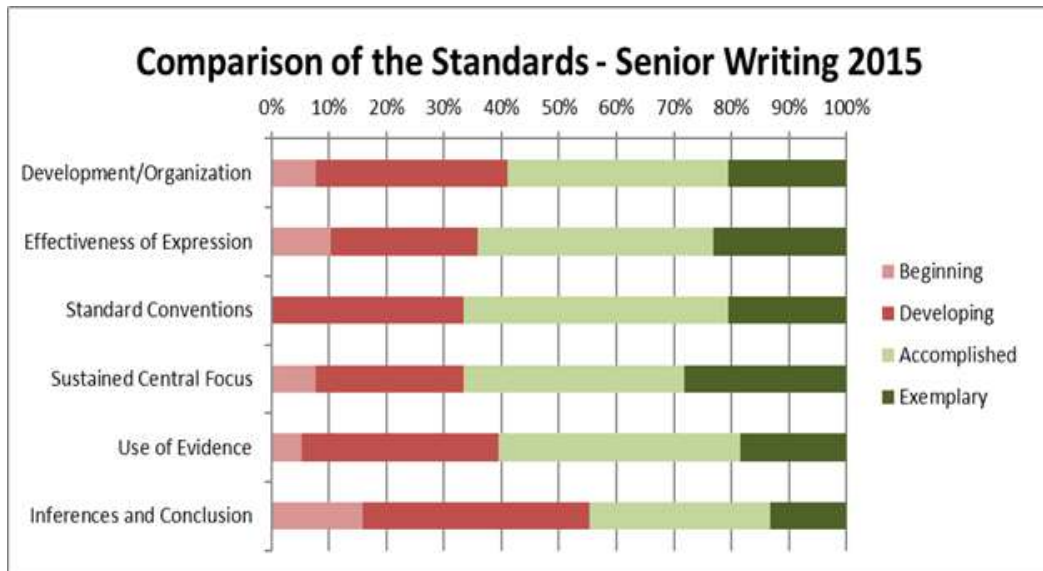
While the target was not met, considerable progress can be seen in the critical thinking components, represented above as the last three rows of the graphs.

### Standard 4.A.1 – CTI 1.3.3

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
| --- | --- |
| Objective 3 | Use critical and creative thinking to solve abstract and applied problems. |
| Indicator 3 | As part of each program review, programs will define, design, and embed assessment to determine the degree of students' success at critical thinking. Programs establish their criteria, gather the data, and prescribe actions necessary when criteria are not met. |

Indicator Status: Target partially met

Beyond the institutional measures, significant progress has been made in individual programs' assessment of students' critical and creative thinking around problem solving. Eighty-five percent of our programs feature critical thinking skills as explicit outcomes as measured by a survey of their TracDat four-column reports. Thirty-five percent of the programs report they have evaluated these skills as a program. Explicit changes due to critical thinking evaluations have not been documented by the programs, although it is clear that programs are evaluating critical thinking as part of their assessments, if for no other reason than that the university-wide rubric has provided them with a template.

### Standard 4.A.1 – CTI 1.3.4

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 3 | Use critical and creative thinking to solve abstract and applied problems. |
| Indicator 4 | Students will self-report the number of opportunities to practice writing on NSSE (NSSE Benchmark: Level of Academic Challenge (LAC)), and results will be consistent with or exceed 2009 findings. |

Indicator Status: Target met

See Standard 4.A.1 – CTI 1.1.3

### Standard 4.A.1 – CTI 1.4.1

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
|---|---|
| Objective 4 | Access and use information resources effectively and ethically (information literacy). |
| Indicator 1 | Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education (information literacy). |

Indicator Status: Target not met but not measured adequately by the instrument used.

Results from CLA performance tasks can be triangulated to assess the disposition of this outcome. CLA states: "Each performance task (PT) asks students to answer an open-ended question about a hypothetical yet realistic situation. The prompt requires students to integrate analytical reasoning, problem solving, and written communication skills as they consult materials in a Document Library and use them to formulate a response. The library includes a range of informational sources, such as letters, memos, summaries of research reports, newspaper articles, maps, photographs, diagrams, tables, charts, and interview notes or transcripts. Each PT is typically accompanied by four to nine documents, and students have 60 minutes to prepare their responses."

PTs require students to employ higher-order thinking skills, more specifically, to:

1. recognize information that is relevant and not relevant to the task at hand;
2. analyze and understand data in tables and figures;

3. evaluate the credibility of various documents;

4. distinguish rational arguments from emotional ones;

5. determine the difference between fact and opinion;

6. identify questionable or critical assumptions;

7. deal with inadequate, ambiguous, or conflicting information;

8. spot deception, possible bias, and logical flaws in arguments;

9. identify additional information that would help resolve issues;

10. weigh different types of evidence;

11. organize and synthesize information from several sources; and

12. marshal evidence from different sources in a written response.

The performance task is scored (on a scale of 1–6) in three sub-skill areas: Analysis and Problem Solving, Writing Effectiveness, and Writing Mechanics. The Analysis and Problem Solving (APS) skill area is specifically related to assessment of information literacy.

Results from the 2015–16 CLA are as follows:

First-year students' results on the APS area were:

Mean = 3.05, median = 3, and a std. dev. = 0.676

Distribution by percentile ranks:

- 22 in the bottom 25th percentile
- 18 in the 25th–50th
- 23 in the 50th–75th, and
- 26 in the top 75th–100th percentile

Senior results on the APS skill were:

Mean = 3.16, median = 3, and a std. dev. = 0.735

Distribution by percentile ranks:

- 24 in the bottom 25th percentile
- 21 in the 25th–50th
- 24 in the 50th–75th
- 29 in the top 75th–100th percentile

These results show definite improvement from the first-year to senior scores on this performance task and specifically the analysis and problem-solving sub-skill. Both the mean and distribution within the percentile ranks improved from the students' first year to their senior year. As noted previously, though, the CLA no longer provides specific reporting on the

value-added gain within sub-skills of the performance task. This change—along with differences in the tasks administered—makes it difficult to report conclusive results on value-added gains from year to year.

Looking at the performance task as a whole instead of just the sub-skills, however, we notice recent results from the CLA indicate the expected scores* for seniors were not achieved when compared to their actual scores. Looking back at the 2012–13 administration of the CLA, we see the most recent prior year of data shows the value-added score on the performance task in the 94th percentile. The year before (2010–11) shows the value-added gain in the performance task in the 84th percentile, while the 2009–10 results are in the 82nd percentile. The most current data, assessed in 2015–16, shows value-added gain in just the 8th percentile. Clearly, there is a significant difference in either the task, the calculation of expected scores, or both. As stated previously, it is for these reasons that the use of the CLA will be discontinued and replaced with the internal assessments developed within the University Assessment Committee.

*Expected scores are determined by the typical performance of seniors at institutions testing similar samples of students. These samples are identified based on a senior's entering academic ability score, which in turn is determined based on either the combined SAT Math and Critical Reading score or ACT composite score.

### Standard 4.A.1 – CTI 1.4.2

| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. |
| --- | --- |
| Objective 4 | Access and use information resources effectively and ethically (information literacy). |
| Indicator 2 | First-time, full-time freshman students' performance on an institutional assessment of information literacy will demonstrate a value-added gain of 10% or more as measured on a pre- and post-assessment. |

Indicator Status: Target partially met

Because information literacy is one of the four foundational learning outcomes of Southern Oregon University, both Hannon Library and individual academic programs assume responsibility for assessing the effective and ethical use of information resources.

Until the 2013–14 academic year, the University Library used a 20-question value-added pre-test/post-test [Exhibit 4.A.1 Information Literacy Pretest] [Exhibit 4.A.1 Information Literacy Posttest] to assess information literacy outcomes. The survey was delivered via Moodle as a pre-test at the beginning of fall term then as a post-test near the end of spring term to first-year freshmen students enrolled in University Seminar courses. Each of the 20 survey questions

provided librarians with an overall picture of our first-year students' areas of strengths and weaknesses. Because only first-year students took the tests, however, the University Library had no information on the information literacy skills of graduating students.

In the 2013–14 academic year, library faculty abandoned the information literacy survey in favor of a more robust means of assessment. In collaboration with the University Assessment Committee, library faculty developed the Institutional Information Literacy Assessment Rubric [Exhibit 4.A.1 Information Literacy Rubric] to assess the references used in student research and writing samples.

The library used five strategies to create its assessment plan:

1. Align Learning Outcomes: Prior to creating an assessment instrument, it is necessary to have a clearly articulated and accepted set of goals, strands, and measurable outcomes or proficiencies that answer the question, "What do we want our students to know?" The Association of College and Research Libraries (ACRL) Information Literacy Competency Standards for Higher Education (2000), the Association of American Colleges & Universities (AAC&U) Information Literacy VALUE Rubric (2013), or the ACRL Framework for Information Literacy for Higher Education (2016) could serve as a basis for institutional outcomes implemented across the curriculum.

2. Assess What Is Valued: Assess the outcomes and learning teaching faculty value. Make sure faculty and interested individuals are involved in the process. From the development of a plan to the discussion of the results, be flexible and listen to others. Measure what is important rather than what is easy to assess. Traditional testing using multiple choice, true/false, and similar questioning strategies is easier to administer and score but provides a better measure of factual knowledge than procedural skills and higher-order thinking. In addition, many assessment instruments, particularly standardized assessment, rely on traditional test questions that do not reflect what faculty want to know about student learning. Finally, student motivation can have an effect on test performance when administering standardized assessments, particularly when their grades are not dependent on their scores.

3. Keep It Simple and Sustainable: Assessment done well can become an all-encompassing job for individuals with a full-time job already. Where to start, what to do, how to review student work, and how to make assessment meaningful can quickly become an overwhelming activity. Interestingly, the tendency is to make initial assessments more unmanageable by trying to assess everything all at once and all the time. Although assessment is a continual, ongoing cyclical process, it is not an all-or-nothing process. Set the goal to assess one or two outcomes and develop further assessment from the results and conclusions. Also synchronize assessments to function at more than one level, such as using results of library assessment to supply the needs of institutional assessments.

4. Make It Relevant: The purpose of meaningful assessment is to improve teaching and student learning by direct rather than indirect means. In other words, assess actual student work samples such as capstone projects, papers, and presentations. These embedded assessments speak to coursework and assignments students have a vested interest in completing to the best of their ability. These work samples can illustrate specific information literacy outcomes where evidence of achieving learning outcomes is found. The ultimate goal is when the assessment itself, beyond the findings, helps develop and strengthen both individual instruction and the information literacy program (Jastram, Leebaw, & Tompkins, 2014).

5. Communicate Assessment Results: Assessment activities generate data that needs to be shared and shared widely. For the most part, it is far easier to collect data than to productively use the data to improve teaching and student learning (Blaich & Wise, 2011). Communicate assessment results to those with the time and interest to improve student learning and engagement. A first step toward improvement is to construct a plan for distributing the results and then to create professional development opportunities for faculty to discuss the findings with the intent of improving teaching and learning.

After piloting the assessment instrument in 2013–14, library faculty evaluated a random selection of 36 papers from a total of 457 senior-level writing submissions solicited from all academic programs in the 2013–14 academic year. The 457 papers represented over half of the 816 bachelor's degrees awarded. The names of students were removed for blind review. The sample size was determined using a stratified sampling method to produce a smaller margin of error than simple random sampling. Each stratum (program) had at least one paper within the sample group proportionate to the total number of submissions. In 2015–16, library faculty evaluated a random selection of 64 papers that included first-year essays along with the senior writing samples from the 2014–15 academic year.

The rubric designed to measure information literacy criteria was primarily developed to assess the citations or references used in senior-level writing or capstone samples. The rubric defines information literacy as, "The ability to know when there is a need for information, to be able to locate, evaluate, and effectively and responsibly use and share that information for the problem at hand." The rubric includes six criteria based on the University's information literacy goal strands and proficiencies:

- Recognizes the need to cite appropriate sources
- Cites sources in a complete and consistent format
- Distinguishes timeliness of sources—current unless of historical significance
- Chooses sources relevant to subject matter
- Incorporates high-quality, discipline-appropriate, or peer-reviewed sources
- Integrates a range of sources (e.g., books, articles, government documents, websites) appropriate to subject matter

The rubric measures each criterion from 1 (beginning) to 4 (exemplary). Reviewers had access to the entire paper, but analysis of the citations was the central focus of the assessment. Use of citations within the paper was assessed as a part of critical thinking, and use of in-text parenthetical references was assessed as a part of written communication. Critical thinking and written communication assessment were conducted by separate teams of library faculty. Library faculty completed the citation analysis for the library and forwarded the findings and recommendations to the University Assessment Committee for institutional assessment purposes.

Library faculty met three times and assessed 10 senior work samples following a six-step process outlined by Maki (2010) stressing the importance of norming the rating process of scoring or inter-rater reliability. Individual raters needed to reach consensus about scoring with the rubric by going through a "calibration period" to consistently apply the rubric to student work samples.

Results of the senior-level writing citation analysis demonstrate considerable variability: 54% of students were rated "exemplary" or "accomplished" on "necessity to cite," but only 46% achieved these ratings on "consistent format." Students fared better on the "timeliness" and "relevance" of sources (66% exemplary or accomplished for each) and "quality" of sources (54% exemplary or accomplished). "Range" of sources had the lowest results, with 60% rated "beginning" or "developing." Overall, ratings on all six proficiencies ranged from 2.24 to 2.73. It is likely a significant portion of lower scores reflect variation in senior-level writing *assignments* rather than senior-level information *literacy*. Several programs submitted writing samples that were clearly not research papers, making assessment of information literacy problematic. One of the recommendations of the University Assessment Committee is that it will give more guidance about the kind of senior-level writing it is looking to assess.

In addition to library assessment of information literacy, most academic programs assess the information literacy of the students in their programs. Many programs focus their assessment on senior-level capstone papers, but some assess information literacy throughout the curriculum. In Biology, assessment is conducted mainly via evaluation of primary literature reviews and correct citation in written documents like lab reports and capstones. Biology conducts a Midpoint Writing Assessment (which includes assessment information literacy) [Exhibit 4.A.1 Biology Midpoint Writing Assessment] in BI 342 as well as performing information literacy assessment in the Capstone course.

Starting in academic year 2014–15, the School of Business began evaluating a sample of 30 to 40 written business plans each year using a rubric that encompasses five Learning Outcomes, one of which is information literacy. Criminology & Criminal Justice introduces information literacy to their students in CCJ 300: Essentials of Criminal Justice Research Writing, [Exhibit 4.A.1 CCJ 300 Criminal Justice Research & Writing Syllabus] which "concentrates on oral and written communication and information literacy skills essential to the criminal justice

discipline." CCJ 400: Capstone Research refines information literacy, measuring it "through the use of assignments, research paper, and oral presentation."

Environmental Science & Policy assesses information literacy primarily through three writing-intensive course: ES 210, ES 310 [Exhibit 4.A.1 ES 310 Env Studies II Syllabus], and ES 494C. The Environmental Science & Policy Evaluation Rubric [Exhibit 4.A.1 Env Studies Writing Rubric] includes three aspects of information literacy: necessity to cite, consistent format, and source quality. In Elementary Education, faculty use the Institutional Information Literacy Assessment Rubric to assess writing in ED 409, ED 460, and ED 495. English assesses information literacy through grade distributions in EN 298: Introduction to Literary Study and EN 400, both of which include annotated bibliographies as major assignments.

Gender, Sexuality, & Women's Studies assesses all their capstone papers in terms of four outcomes and two skills, one of which is, "Students will demonstrate an ability to evaluate information and engage in diverse perspectives." The GSWS Outcome Assessment Results 2015 [Exhibit 4.A.1 GSWS Outcome Assessment Results] shows five out of six students scoring three or above on a five-point scale. History & Political Science assesses information literacy via students' ability to construct a bibliographic review of literature in HST/PS 300: Research & Writing and HST/PS 498: Senior Seminar.

The Honors College uses the AAC&U Information Literacy VALUE Rubric to assess information literacy in HON 101, 102, 103 (the first-year introductory writing sequence) and HON 490 (the senior Capstone course). [Exhibit 4.A.1 Honors 490 Capstone Syllabus] The Scoring Rubric for HON 301 Final Papers [Exhibit 4.A.1 Honors 301 Final Paper Rubric] includes assessment of:

1. Evidence: Primary source information is used to buttress every point with at least one example.
2. Examples support the main point of the paragraph and the overall thesis.
3. There is excellent integration of quoted material.
4. There is a wide variety of sources.

Because the Honors College started in academic year 2013–14, it has not yet had the opportunity to compare first-year and fourth-year students' information literacy learning outcomes. Psychology requires all students to take at least two research and writing courses: PSY 325: Writing & Research in Psychology and PSY 498/499: Research Capstone. Psychology is currently developing an assessment that will provide evidence of growth or change in information literacy. Sociology & Anthropology (SOAN) evaluates senior capstone work using its own Outcomes Rubric for Written and Oral Communication [Exhibit 4.A.1 Soc Writing and Info Literacy Rubric] based on the AAC&U VALUE rubric for information literacy. The rubric includes standards for assessing consistent citation style, use of high-quality sources, and incorporation of a wide range of source types. Though it frames information literacy primarily in terms of accurate and consistent citations, the Human Service Program uses standardized grading criteria for the both the Program Proposal and Program Rationale & GOS in PSY 429.

USEM and Houses (Green, Social Justice) all use the Foundational Goals Evaluation Rubric [Exhibit 4.A.1 UStudies Foundational Goals Rubric] to assess the FUSE all students must write by the end of their first year. This rubric includes the same four measures of information literacy as the rubric used by library faculty:

Blaich, C. & Wise, K. (2011). *From gathering to using assessment results: A report from the National Institute for Learning Outcomes Assessment*. Retrieved from learningoutcomeassessment.org/documents/Wabash_001.pdf.

Jastram, I., Leebaw, D., & Tompkins, H. (2014). Situating information literacy within the curriculum: Using a rubric to shape a program. *Portal: Libraries & The Academy*, 14(2), 165–186.

Maki, Peggy L. (2010). *Assessing for learning: Building a sustainable commitment across the institution* (2nd edition). Sterling, VA, USA: Stylus Publishing. Retrieved from ebrary.com.

### Standard 4.A.1 – CTI 2.1.1

| Core Theme 2: Intellectual Growth | Students and faculty will extend and refine broad-based general knowledge and specialized knowledge in one or more specific discipline(s). |
|---|---|
| Objective 1 | Understand and apply knowledge within the arts, humanities, social sciences, and sciences as part of a University Studies curriculum. |
| Indicators 1 & 2 | Through the use of embedded assessments, students will demonstrate a continued growth of broad general knowledge.<br><br>University Studies faculty will maintain currency in the discipline taught, including service to the departmental and institutional administrative, committee, and student support and retention activities. These contributions will be reported annually in the Faculty Professional Activity Report. |

Indicator Status: Partially met

Core Theme 2.1 is addressed within the structure and content of the University Studies curriculum, SOU's general education program. Three components and 10 strands comprise the University Studies Goals:

1. Foundations (Strands A–D)
2. Explorations (Strands E–G)
3. Integrations (Strands H–J)

Students complete one class for each strand, with the exception of the Explorations sequence (E, F, G), for which students complete three classes or a certain number of credit hours (if a transfer student). Foundational sequence (Strands A, B, C, D) and Explorations sequence classes are lower division (100- and 200-level), and Integration classes (Strands H, I, and J) are upper division (300- and 400-level). The overall scheme of the University Studies curriculum provides both breadth (Foundations/Explorations) and depth (Integration). Foundational goals of communication, critical thinking, and informational literacy (Strands A, B, C) are completed as part of University Seminar or House Seminar, SOU's first-year experience). Four credits of Strand D (Quantitative Reasoning) are required of all students.

The University Studies strands are:

- Strand A – Communication
- Strand B – Critical Thinking
- Strand C – Information Literacy
- Strand D – Quantitative Reasoning
- Strand E – Arts & Humanities
- Strand F – Social Science
- Strand G – Sciences (Biological, Physical, Computer)
- Strand H – Science, Technology, & Society
- Strand I – Citizenship & Social Responsibility
- Strand J – Diversity & Global Awareness

The University Studies Committee is responsible for overseeing the development and maintenance of the University Studies curriculum. The committee comprises seven faculty members and the director of undergraduate studies. The associate provost, one student, and representatives of academic support programs, Enrollment Services, and Admissions serve as ex officio members.

The committee's charge is to:

1. Review and recommend modifications to the general education program as needed, including the associated goals and proficiencies.
2. Develop and maintain criteria for courses meeting specific goals.
3. Through the Undergraduate Curriculum Committee, review and recommend new courses to Faculty Senate that will meet University Studies criteria.
4. Develop and maintain a systematic process for reviewing existing courses approved for University Studies at least once every five years to ensure they continue to meet current criteria.
5. Recommend policy changes or additions needed to support general education at Southern Oregon University.

6. Assist faculty or staff responsible for evaluating transfer courses.
7. Work with the Institutional Assessment Committee on the effectiveness of the general education component of Southern Oregon University's undergraduate program.

Courses gain approval for University Studies designation through a review process guided by the committee. Revision of the template for course adoption policy and procedures was initiated during winter term 2016 and will take effect AY 2016–17 for applications seeking approval through the committee. The application must identify at least one of the goals for the strand as a primary focus while identifying any other strand goals that are addressed. "Addressed" goals introduce students to proficiencies but receive less emphasis than "primary goals." Foundational strands should be addressed in all University Studies courses.

For each goal or proficiency, the application must explain what students will do to demonstrate understanding or mastery. Assignments that will be used to assess the students' proficiency must be described, and one example assignment must be included as well as a condensed syllabus and full syllabus. The application form for each strand is posted on the University Studies website.

The new application requirements introduce additional rigor into the approval process by requiring that all applications identify the proficiencies/goals the course will address and describe specifically the embedded assessments (e.g., assignments) that will be used to demonstrate student mastery of the proficiency/goal.

In addition to a rigorous review process for new courses, another practice has been recently instituted that requires faculty receiving a stipend to develop or redesign an existing course to work with the Center for Instructional Support (CIS). The CIS provides faculty development and support as well as assisting faculty with course design and redesign. The redesign process involves working with faculty to review the program outcomes associated with the course (including University Studies Program outcomes), identify the course learning outcomes, and map teaching and learning activities to the course learning outcomes to embed assessments. For an explanation of the process and an example of a course redesign using this process, see Computer Science 346 Course Design, Review & Delivery Process; CS346 Online Version: Course Assessment Plan; [Exhibit 4.A.1 Curriculum Redesign Process – Example CS346] and CS346 Syllabus. [Exhibit 4.A.1 CS 346 Computer Forensics Syllabus]

The Curriculum Design Academy (CDA) project facilitated by the CIS involves the redesign of six University Studies courses to be offered in fall 2016 (Psychology 201 and 202; Math 243; USEM 101; and Foreign Language 101 and 102). Three to four more courses will be redesigned and offered in 2017. These courses were all approved by the University Studies Committee prior to the implementation of the new application process. The Curriculum Design Academy focuses on high-enrollment University Studies courses, reflecting SOU's commitment to embedded assessment and improvement of student learning experiences. More than 2,500 students enrolled in these courses in 2015–16.

The initial step in the redesign process for CDA courses involves performing an evaluation of course alignment to the strand goals and proficiencies as well as to program outcomes. An example of such an evaluation is the Psychology 201/202 Alignment Factors Assessment. [Exhibit 4.A.1 Psychology 201 202 Alignment Factors] During the course design process, a three-column assessment plan is created that explicitly describes each learning goal; assessment activity/assignment associated with each learning goal; and teaching and learning activities associated with each assessment activity. The University Seminar 101 Three-Column Course Assessment Plan (in process) [Exhibit 4.A.1 USEM 101 Course Assessment Plan] is an example of this step. The intent is to create course *frameworks* specifying the outcomes associated with the course (University Studies outcomes, program outcomes for the course, and specific learning outcomes) and to ensure mastery of each outcome is assessed using embedded assessment.

These course frameworks are ultimately to be used by every instructor who teaches the course. Instructor creativity and discipline are reflected in their design of teaching and learning activities and choice of instructional strategies, but these must map directly to the assessment plan and explicitly address the learning outcomes. This reduces the problem that tends to occur over time when courses are taught by different faculty members, and syllabus modifications are made by faculty unaware the course was approved as a University Studies course. These courses, as a result, may no longer meet University Studies requirements.

The new course design process required for all redesigned courses and all courses applying for University Studies approval does not address courses approved by the University Studies Committee prior to the implementation of the new application process.

The University Studies Syllabi Inventory Project is designed to address these remaining courses. For a joint project with the Center for Instructional Support, the University Studies director has collected 403 University Studies course syllabi for courses taught during the last three terms (fall 2015, winter 2016, and spring 2016) to review the syllabi for embedded assessments related to the goals and proficiencies defined for each University Studies strand. The intent is to provide information to the University Studies Committee for 2016–17 activities related to their charter requirement to develop and maintain a systematic process for reviewing existing courses approved for University Studies at least once every five years to ensure they continue to meet current criteria.

Courses must meet the following conditions to make it possible to use embedded assessments to demonstrate a *continued* growth of broad general knowledge:

1. The course has learning outcomes.
2. Learning outcomes are mapped to program outcomes.
3. Learning outcomes are mapped to University Studies outcomes for the strand.
4. Robust assessments (assignments) are mapped to University Studies outcomes.
5. Assessment data is collected over time (does not include foundational strands A–D).

6. Collected data is analyzed (does not include foundational strands A–D).

As part of the Syllabus Inventory Project, 184 University Studies syllabi (courses taught during fall 2015, winter 2016, or spring 2016) were evaluated according to the above conditions. Conditions 1–4 were met as follows:

1. 48 have learning outcomes only (26%).
2. 25 have learning outcomes AND map to program outcomes (13%).
3. 21 have learning outcomes AND map to program outcomes AND map to University Studies outcomes (11%).
4. 37 have learning outcomes AND map to program outcomes AND to University Studies outcomes, AND they have embedded assignments (20%).

It was also noted that 131 of the courses (71%) articulated learning outcomes, while 53 (29%) did not.

Courses that met Condition #4 include Biology, Chemistry, and Physics laboratory courses, which fulfill Strand G (Sciences: Biological, Physical, Computer). A key learning outcome for Strand G is to: *Understand science as a means of learning about and understanding the natural world.* To demonstrate proficiency, students need to be able to generate and test scientific hypotheses by:

1. Designing and carrying out experiments and systematic observational studies. In some cases, this may include a laboratory or field setting.
2. Using appropriate tools to analyze results.
3. Communicating results orally and in writing according to established standards of scientific communication, including appropriate use of tables, figures, and graphs.

For lab science courses, application of critical thinking, quantitative reasoning, and problem-solving skills to evaluate scientific evidence, theories, and hypotheses takes place primarily through direct experimentation and analysis in the lab. This goal is assessed through lab reports, which reveal the experimental procedure, data collection, rigorous data analysis, and comparison of results with theory.

Programs that met this criterion in other strands include English, which assesses Humanities outcomes (Strand E) through papers and final exams as well as assessing student achievement of discipline-specific learning outcomes through formal paper assignments in E, I, and J University Studies strands (see ENG 209). [Exhibit 4.A.1 ENG 209 Lit in the Modern World Syllabus]

HON 315 includes direct measures of several Humanities-related outcomes, including the understanding of:

- basic formal elements, principles, and composition structures in written, oral, visual, or performed texts, works, and/or artifacts;
- how cultural and historical factors impact the creation of written, oral, visual, or performed texts, works, and/or artifacts; and
- how the reception of texts, works, and/or artifacts influences individuals, cultures, and societies.

The Environmental Science & Policy Program faculty specifically design courses designated as University Studies to meet the learning outcomes for each strand. Some exemplary courses include a course outcome table (course learning outcomes, University Studies outcomes, and specification of assessment methods for each outcome. The majority of Business Administration courses specify learning outcomes and program outcomes, identify University Studies strands, and explicitly map assessments/assignments in a summary table (e.g., BA 320). [Exhibit 4.A.1 BA 320 Bus Gov and Nonprofits Syllabus] Honors College administers proficiency assessments based on rubrics that align course learning outcomes with University Studies Strands E through J.

Condition #4 was also met by individual courses in Art (e.g., Art 133), [Exhibit 4.A.1 ART 133 Drawing Syllabus] Criminology & Criminal Justice (e.g., CCJ 430), [Exhibit 4.A.1 CCJ 430 Crime Control Theories and Policies Syllabus] Computer Science (CS 346), [Exhibit 4.A.1 CS and CCJ 346 Computer Forensic Syllabus] Communication Studies (COMM 200), Emerging Media & Digital Arts (EMDA) (ART/EMDA 331), [Exhibit 4.A.1 ART EMDA 331 The Art of Data Visualizing our World] Gender, Sexuality, and Women's Studies (GSWS 410), [Exhibit 4.A.1 GSWS 410 Feminist and Queer Theory Syllabus] Music (MUS 204), and Sociology & Anthropology (SOAN 319). Sociology & Anthropology substantially contributes to University Studies, especially Strands F and J. SOAN 319 [Exhibit 4.A.1 ANTH 319 Latin American Through Film] is an example of a course that connects course learning outcomes to embedded assessment.

For assessment of continued growth, Conditions #5 (collection of assessment data over time) and #6 (analysis of collected data) must also be met. To address these conditions, additional support will be offered for faculty members whose syllabi exhibit the following characteristics:

- Learning outcomes are not documented (especially course learning outcomes and related University Studies strand outcomes).
- Course is high-impact (e.g., a University Studies "gateway course" with relatively high enrollment).
- Course enrolls a relatively high number of first-year students.
- Course is taught more than once a year.

Faculty who will be teaching the courses in fall 2016 will be contacted prior to the beginning of the term (based on the review that has already been conducted). Additional syllabi not included in the Syllabus Inventory Project will be reviewed within two weeks of fall term start; if

they show the characteristics listed above and the courses will be taught in future terms, faculty will be contacted mid-term.

The directors from University Studies, the Center for Instructional Support, and University Assessment are committed to meeting with faculty who teach our general education curriculum to discuss the importance of making expectations clear to students (especially first-year students) and identify significant learning goals and outcomes, which are explicitly mapped to program goals and University Studies strand outcomes. Faculty will be asked to identify assignments that assess these outcomes. If necessary, assistance with assignment design will also be provided for future offerings of the course.

With respect to disciplinary currency; service to the University and program; and engagement in retention and other activities, roughly 75% of the faculty who teach University Studies courses are full-time, either professorial or professional faculty members. These are full-time appointed, permanent faculty members for whom professional development; maintaining currency in field of study; and service to departmental and institutional administrative, committee, and student support and retention activities are expectations as per the Collective Bargaining Agreement and Faculty Bylaws. These contributions are reported annually in the Faculty Professional Activity Report. The remaining faculty—either adjunct (on full-year appointments) or on term-by-term appointments—are not held to the same expectations for professional activities or reporting.

The total number of faculty teaching University Studies curricula varies according to the courses scheduled during a given term.

For the 2014–15 academic year, 88 faculty taught courses with the University Studies designation, broken out as follows:

Adjuncts – 12% of student enrollments are taught by adjuncts

Term by term – 12%

Professional – 19%

Professorial – 56%

Other – 1%

While numbers vary by term and courses offered, the overall proportion of full-time faculty responsible for the design and administration of the University Studies curriculum is likely to change only slightly. These numbers demonstrate both the currency of the faculty teaching University Studies as well as an acceptable degree of engagement in service and other University activities.

## *Standard 4.A.1 – CTI 2.2.1*

| Core Theme 2: Intellectual Growth | Students and faculty will extend and refine broad-based general knowledge and specialized knowledge in one or more specific discipline(s). |
|---|---|
| Objective 2 | Integrate and apply advanced knowledge and skills in one (or more) specialized area(s) of study. |
| Indicators 1 & 2 | Assessment of students' knowledge in a specific (major) discipline will be assessed and evaluated by each program. Statistics on students' knowledge will be reported to the Institution on a regular schedule. Program-level outcome assessments may include content exams, capstone analyses, final projects, or portfolios. Programs will demonstrate (through their academic program review) a consistent pattern of students' academic growth in program outcomes at 70% or better.<br><br>Major program faculty will make direct contributions to the local regional, national, and international societies through scholarly activity (contributions will be reported annually in the Faculty Professional Activity Report). |

Indicator Status: Target met

As of academic year 2012–13, all academic programs at SOU develop assessment plans and post them on TracDat as part of their annual reporting. For the academic years 2013–14 and 2014–15, programs submitted annual program reviews. For 2015–16, programs conducted an accreditation self-study instead of a program review. The University Assessment Committee reviews annual reports to determine the extent to which each program meets the following criteria:

1. Program outcomes are defined, measurable, and mapped to courses.
2. Each program outcome has a direct assessment identified.
3. Program data pertaining to knowledge, skills, and dispositions in the major are collected, analyzed, and reported.
4. Assessment data are used to improve the program.
5. Initiatives based on assessment data improve achievement.

Based on the UAC 2014–15 program review of 33 programs, the percentage of programs that met each criterion *fully* were:

1. Program outcomes are defined, measurable and mapped to courses: 41%
2. Each program outcome has a direct assessment identified: 28%
3. Program data pertaining to knowledge, skills, and dispositions in the major are collected, analyzed, and reported: 28%
4. Assessment data are used to improve the program: 16%
5. Initiatives based on assessment data improve achievement: 13%

While we have seen considerable progress in the extent to which academic programs are developing and executing assessment plans, clearly there are still gains to be made. Several exemplar programs met the following criteria, however. They:

a) received a score of 2.4 or above out of 3 according to the UAC Committee Review of 2015–16;
b) use a majors' field test or other external proficiency assessment; or
c) utilize performative assessment.

These programs were Anthropology, Biology, Business, Chemistry, Creative Arts, Elementary Education, Health & Physical Education, Mathematics, Music, Outdoor Adventure Leadership, and Sociology. Below are details regarding example program outcomes; data collected and reported; and where relevant, how assessment data is being used to improve the program and how initiatives based on assessment data improve achievement.

## ANTHROPOLOGY

(As of AY 2015–16, Anthropology has been combined with Sociology and is now Sociology & Anthropology (SOAN).)

The Anthropology Program used a capstone project to assess programmatic outcomes. A common programmatic capstone rubric is used to assess all capstones.

Program outcomes:

1. Explain and illustrate how people, culture, environment, society, power relationships, and institutions interact across time and space.
2. Understand cultures and lifestyles, both my own and those different from my own.
3. Understand the social forces and institutions that shape people's lives.
4. Understand power differences in social relationships and institutions.
6. Identify processes of adaptation and change that connect contemporary conditions with the past.
7. Relate cultural and social particulars to general human patterns.

When assessed against a goal that greater than 75% of students will receive an average score of proficiency that is adequate or better, 95% of students received an average faculty score of adequate or better in 2014–15 (prior to Anthropology's integration with Sociology).

Critical thinking outcomes included: document, analyze, and interpret the dynamics of culture and society using the conceptual frameworks of anthropology; formulate research questions using the frameworks of anthropology; employ appropriate data collection methods to discover and document patterns in behavior and worldview; and describe the dynamics of culture and social life in a specific ethnographic setting.

The goal that more than 75% of students will receive an average score of proficiency that is adequate or better was exceeded, with 100% of students receiving an average faculty score of adequate or better.

Outcomes related to written and oral communication as well as sensitivity to diverse sociocultural settings were assessed against a goal of greater than 75% of students will receive an average score of proficiency that is adequate or better. In this case, only 5% of students received an average faculty score of adequate or better.

The final outcomes related to the practice of ethically grounded, reflexive, and socially useful anthropology and the development of anthropological understandings of social issues and problems; ethical issues; political and policy concerns; and reflective positionality. Aiming to record more than 75% of students receiving an average score of proficiency that is adequate or better, the program reported 100% of students received an average faculty score of adequate or better (June 1, 2015).

The Anthropology faculty's annual Faculty Professional Activities Reports demonstrated adequate engagement with regional, national, and international professional associations; adequate scholarly activity; and annual reporting.

## BIOLOGY

For every course, the Biology Program has a three-column map of assessments (e.g., course assignments, exams) that are used to measure to student learning outcomes (see BI 331 Assessment map as an example). [Exhibit 4.A.1 BI 331 Learning Outcomes Assessment Map]

At the end of their junior year, majors take a standardized ETS Biology Major Field Test (MFT), which ranks their knowledge across a broad range of biology topics relative to national averages. Our students performed well on average compared to other biology majors nationwide. The mean overall score ranked in the 65th percentile rank, with 93% at or above the 25th percentile rank and 73% at or above the 50th percentile rank. Analysis of sub-scores suggested room for improvement in all areas, especially genetics and molecular biology.

The Biology Program also administers the ETS Major Field Test during the senior year. SOU seniors performed well compared to other biology majors nationwide. Mean overall score was

at the 65th percentile rank, 60% of students scored above the 20th percentile rank, and 47% of students scored above the 50th percentile rank.

Students plan, conduct, and write a thesis on a scientific project as their senior capstone. Faculty evaluate the capstone using a Biology Capstone Rubric. [Exhibit 4.A.1 Biology Capstone Rubric] A score of zero was given to students who did not meet expectations, a score of one was given to students who met expectations, and a score of two was given to students who exceeded expectations. The scores given by each faculty member were averaged for each student. In addition, the student averages were averaged. Student scores for Skill 3 ranged from 0.86 to 1.75, with an overall average of 1.24. Three out of 10 students had an average score of less than 1.0, but seven (70%) met or exceeded expectations.

Biology was assessed by the University Assessment Committee as an exemplar on its 2015 annual program assessment report, with all program outcomes defined and measurable; direct assessments identified; and program data collected, analyzed and reported. Biology uses data from student assessments to modify assignments and teaching practices.

Most Biology faculty are members of professional societies, through which they keep informed of general trends within the field and their sub-specialties specifically. At discussions during program meetings and retreats, they share information regarding the relevance of our program and best practices in the field. For example, the American Association for the Advancement of Science recently published "Vision and Change in Undergraduate Biology Education" based on the work of leaders in the life sciences and science education. The article provides recommendations for reinvigorating the biology curriculum. Our program is using this document to explore ways to improve teaching, particularly within introductory courses. Recently, two Biology faculty members represented our program at a workshop of the Northwest Partnership for Undergraduate Life Science Education at Willamette University to collaborate on these efforts with faculty from other colleges and universities.

## BUSINESS

The School of Business publishes its learning outcomes and assessment results as a presentation at its website, which includes several years' worth of data for comparison. The program uses multiple methods to prove proficiency in program learning outcomes: comprehensive business plan and business plan presentation; ETS Major Field Test; community-based research; business simulation game; and internship (employers evaluate students' performance). Details are provided below on the capstone project and ETS Major Field Test.

Business students develop a business plan as their BA 499 Capstone project to demonstrate content knowledge and put into practice information gleaned from studies and personal experience relating to business and business management. The students are required to apply what they have learned in their core business courses. This format enables students to identify and address a full range of business issues, including strategic planning, marketing, finance,

and operations. In an annual practice that began in AY 2014–15, 30 to 40 samples of written business plans are evaluated and assessed using a common Business Capstone Rubric, [Exhibit 4.A.1 Business Capstone Assessment Rubric] which includes all of the program's learning outcomes. The overall average score was 3.29/4.

Both undergraduate and graduate students near the end of their program of study participated in the ETS Major Field Test, with the following results:

| Number | 2015–16 ($n$=30) | 2010–11 ($n$=47) |
|---|---|---|
| Count above 50th percentile | 70% | 51.1% |
| Count below 50th percentile | 30% | 48.9% |

As a result of programmatic assessments, the School of Business added Business Communication as a core requirement to improve students' oral and writing skills, created a course in Advanced Spreadsheets as a program prerequisite to enhance students' ability to analyze data, and initiated an ePortfolio project to help students document their work leading up to the Capstone course.

Business faculty's annual Faculty Professional Activities Reports demonstrated adequate engagement with regional, national, and international professional associations; adequate scholarly activity; and annual reporting.

## CHEMISTRY

The Chemistry Program uses the following standardized tests in assessment:

1. 2009 National Standardized Exam for Instrumental Analysis, developed by the American Chemical Society.

   **Criterion:** 50% of students score at or above the 50th percentile.

   **Result:** 6 out of 6 alumni (100%) earned a score at or above the 50th percentile (2014–15).

2. National Standardized Exam for Organic Chemistry developed by the American Chemical Society Examination Committee.

   **Result:** 100% of students (12/12) scored at or above the 50th percentile (2012–13).

3. Standardized ACS Analytical Chemistry Exam.

   **Result:** 88% of students (15/17) scored at or above the 50th percentile (2013–14).

4.  2006 National Standardized Exam in Physical Chemistry.

    **Criterion:** 50% of students score at or above the 50th percentile.

    **Result:** For *n* of 5, 50% of students were not above the 50th percentile (2015–16).

5.  2007 National Standardized Exam for Analytical Chemistry, developed by American Chemical Society Examination Committee.

    **Criterion:** 50% of students score at or above 50th percentile.

    **Result:** 5 out of 8 chemistry majors who graduated in the 2014–15 academic year scored at 50th percentile or better.

6.  2003 ACS Standardized Exam in Biochemistry.

    **Criterion:** 50% of students perform at 50th percentile or better.

    **Result:** 6 out of 6 students scored above the 50th percentile (2014–15); the class average was in the 77th percentile.

7.  Graduating seniors are given the Diagnostic of Undergraduate Chemistry Knowledge (DUCK) examination.

    **Criterion:** 50% of students score at or above the 50th percentile.

    **Result:** More than 50% of students scored above the 50th percentile (2015–16).

Chemistry faculty's annual Faculty Professional Activities Reports demonstrated adequate engagement with regional, national, and international professional associations; adequate scholarly activity; and annual reporting.

## CREATIVE ARTS

Creative Arts major programs emphasize hands-on experience with contemporary practice. This has been demonstrated in the Emergent Forms Reading Series; Schneider Museum of Art's lecture and Visiting Artist series; and the Emerging Media Convention (EmCon), an annual event developed and organized by students to bring leading professionals in the field to campus. Several courses emphasize students' demonstration of advanced achievement in their majors. In ART 358, part of the coursework includes students and faculty traveling to the California Conference for the Advancement of Ceramic Art (CCACA) to experience new forms in ceramics. Creative writing students publish in *The West Wind Review*. EMDA 409 promotes collaboration with community partners, and EMDA majors submit new work to the Ashland Independent Film Festival (AIFF) and Rogue Valley Television (RVTV).

An example of a performative assessment in Art is the oral presentation and artist statement performance at the Mid-Program Review (MPR) (Art 300). The criterion is 70% of students will meet defined proficiencies in the MPR rubric in the categories of Elements of Design; Creativity/ Originality/Aesthetics; Skill/Craftsmanship/Technique; Communicates with the

Viewer; and Research. Review of the MPR results shows most students meet the program's expectations with scores of 8.4 to 10.5. The areas in which most students had difficulties were in research, presentation, and artist's statement.

Creative Arts faculty contribute to professional societies through their own work; by communication and collaboration with colleagues in professional societies; and via regular attendance and participation in conferences, meetings, blogs, online chats, and forums. Faculty are members of the Oregon Art Educators Association; College Art Association; National Council on Education for the Ceramic Arts; Foundations in Art; Theory and Education; Association of Writers and Writing Programs; and Electronic Literature Organization.

## ELEMENTARY EDUCATION

Faculty review professional portfolios created by students in their senior years, highlighting the InTASC Standards of professional teaching. Rubrics have been established and refined for this assessment. Students are supervised in various levels of field placement, including practicum, Capstone, and student teaching.

Elementary Education courses map to several outcomes:

1. **Outcome:** Communicate effectively in writing, speech, and technology.

   **Criterion:** In Reading Methods 463a, students work in a group presentation/book club format to create presentations covering the significance of a selected book to the study of literacy; provide examples of how the book relates to course readings; and generate at least two interactive activities from the book that apply to literacy. The goal is for 85% of students to score 80% or better.
   **Result:** In 2013, 92% of students met the benchmark. In 2014, 100% of students met the benchmark (03/23/2016).

   **Criterion:** Students create a three-lesson unit for elementary-grade level and present a 10-minute overview. The goal is for 95% of students to score proficient or above on rubric.
   **Result:** Criterion not met in fall term; 21 out of 22 met criterion in winter term: 12 out of 14 met criterion in spring term (03/27/2016).

   **Criterion:** Proficiency in multicultural education assessed via a concise, coherent paper of no more than three to five pages, with 75% scoring proficient on a 4-point rubric.
   **Result:** 100% met criterion in 2013; 100% met criterion in 2014.

   **Criterion:** Foundations: Philosophy of Teaching paper, with 80% scoring proficient or above on rubric.
   **Result:** 95% of students met in 2013; 94.5% of students met in 2014 (03/23/2016).

**Criterion:** Students create a professional portfolio demonstrating understanding of the field of education, with 100% scoring proficient or above.

**Result:** In 2015, 80% of degree-only students met criterion and 100% of licensure students met criterion (03/23/2016).

2. **Outcome:** Critical Research – Access and evaluate information resources to become critical consumers of research on complex issues in education.

   **Criterion:** In Reading Methods (463b) Literacy Philosophy, 85% of majors achieve scores of 80% or higher.

   **Result:** 92% met criterion in 2013; 20% did not meet criterion in 2014 (03/23/2016).

3. **Outcome:** Engage in the community through service projects and fieldwork in schools and other educational settings.

   **Criterion:** conduct a community-based learning project in which students demonstrate key knowledge of education outcomes and leadership skills, with 80% scoring proficient or above on rubric.

   **Result:** 70% of degree students scored proficient or above (03/27/2016).

   **Criterion:** 95% of student teachers score proficient or better on spring term work sample.

   **Result:** 92% of students met criterion in winter term; 92% of students met criterion in spring term (03/23/2016).

4. **Outcome:** Examine personal attitudes, values, and assumptions and explore diverse cultural views, perspectives, and practices.

   **Criterion:** Culturally Responsive Teaching Jigsaw – Students research and develop teaching presentation for students with special needs or from underrepresented cultures with the goal of 90% of students achieving a score of 85% or better.

   **Result:** 34 of 36 students met criterion in the first two terms of 2015–16 (03/27/2016).

Elementary Education faculty's annual Faculty Professional Activities Reports demonstrated adequate engagement with regional, national, and international professional associations; adequate scholarly activity; and annual reporting.

## HEALTH & PHYSICAL EDUCATION (HPE)

Health & Physical Education's major assessment is a capstone paper and presentation required for all graduating seniors, in addition to several performative and knowledge-based assessments.

1. **Outcome:** Students will be able to explain fundamental principles of exercise science.

**Criterion:** On comprehensive exercise science content exam (PE 473), 75% of students will score 75% or higher.

**Result:** 93% of students scored 75% or higher on the exam.

2. **Outcome:** Students will demonstrate competency in discipline-specific quantitative reasoning related to statistical analysis and associated visual representation of data.

   **Criterion:** 75% of students will score 75% or higher on assignment in PE 412, which assesses competency in analyzing, graphing, and interpreting a discipline-specific dataset.

   **Result:** 75% of students scored 75% or higher on the assignment.

3. **Outcome:** Students will be able to communicate effectively through writing in Standard American English (writing in the discipline).

   **Criterion:** 80% of students enrolled in the HPE writing component (PE 439) will score 80% or higher on their final paper.

   **Result:** 83.3% of students met or exceeded the criterion score.

Supporting Action: Modified curriculum based on prior years' data/findings to include more writing assignments and to introduce these earlier in the curriculum (three writing-intensive, discipline-specific assignments were introduced in HE 250). This, in addition to our writing component (PE 439), has supported the validity of the changes we made.

HPE faculty's annual Faculty Professional Activities Reports demonstrated adequate engagement with regional, national, and international professional associations; adequate scholarly activity; and annual reporting.

## MATHEMATICS

The Mathematics Program has a full set of program outcomes, which are defined and measurable while having direct assessments. Program data are collected, analyzed, and used to improve the program according to the following criteria and desired outcomes.

1. **Criterion:** 80% of graduating mathematics majors average B- or better in the five required upper division sequences (Foundations, Analysis, Abstract Algebra, Probability & Statistics, Applied).

   **Result:** In 2014, 83% of graduating mathematics majors averaged B- (2.7) or better in the five required upper division sequences. This is an improvement from 2012 (60%) and 2013 (80%).

2. **Criterion:** 80% of mathematics graduates who apply for graduate programs in mathematics are admitted to at least one.

**Result:** 100% (*n*=4) of mathematics graduates applied and were admitted to graduate programs.

3. **Criterion:** Performance evaluation conducted by faculty in MTH 421 and MTH 461 indicates 60% of their students can effectively analyze data.

   **Result:** 88% of students can effectively analyze data (this is an improvement from 80% in 2013).

4. **Criterion:** Performance evaluation conducted by faculty in MTH 421 and MTH 461 indicates 60% of their students can effectively model real-world problems.

   **Result:** 88% of students can effectively analyze data (this is an improvement from 80% in 2013).

5. **Criterion:** Performance evaluation conducted by faculty in MTH 411, MTH 431, and MTH 441 indicates 60% of their students can construct effective mathematical arguments.

   **Result:** Course instructors reported 60% to 80% in all classes.

Mathematics faculty's annual Faculty Professional Activities Reports demonstrated adequate engagement with regional, national, and international professional associations; adequate scholarly activity; and annual reporting.

## OUTDOOR ADVENTURE LEADERSHIP (OAL)

The Outdoor Adventure Leadership Program supports professional certifications, the completion of which demonstrates advanced skills and knowledge related to the field.

Professional certifications include: Wilderness & Remote First Aid (American Red Cross (ARC)); Avalanche I (American Institute for Avalanche Research & Education (AIARE); Ski/Snowboard Instructor (Professional Ski Instructors of America (PSIA)/American Association for Snowboard Instructors (AASI)); Swiftwater Rescue Technician I (Rescue 3 International); Technical Rope Rescue: Technician Level (Rescue 3 International); Swiftwater Rescue Technician Advanced (Rescue 3 International); Open Water Diver (SCUBA Educators International (SEI)/Confédération Mondiale des Activités Subaquatiques (CMAS)); Advanced Open Water Diver (SEI/CMAS); Dive Rescue & Accident Management (SEI/CMAS); Divemaster (SEI/CMAS); Open Water SCUBA Instructor (SEI/CMAS); Whitewater Kayaker Level 1–4 (American Canoe Association (ACA)); Challenge Course Facilitator (Association for Challenge Course Technology (ACCT)); Zip Line Guide (ACCT); and Leave No Trace (Center for Outdoor Ethics). A key element of specialized knowledge in OAL is risk management. In winter 2014, the OAL Risk Management Manual was completed. All students in OAL 375 reviewed and discussed the manual, and 100% of students demonstrated an ability to understand and apply the manual.

Students complete an OAL Capstone (OAL 443) and are evaluated based on scores received on their final paper. The desired outcome is that students will be able to communicate

effectively through writing using Standard American English. The criterion for this outcome was that 80% of students will score 80% or higher on their final paper. In 2014–15, the criterion was not met—only 63% of students scored 80% or higher. Actions taken include adding writing to OAL 425, which has been designated as the writing component of the major so scientific writing can be emphasized. In addition, the institution-wide senior writing rubric has been made available to students, and the assignment has been revised to align with the rubric. Strict guidelines are being imposed, and writing development has been aligned with the rubric.

Other OAL assessments include:

1. **Outcome:** Students will be able to articulate and apply risk management procedures commonly used during outdoor activity facilitation.

   **Criterion:** 95% of students enrolled in OAL 375 will complete the assignment.

   **Result:** In winter 2014, the OAL Risk Management Manual was completed. All (100%) students in OAL 375 reviewed and discussed the manual, and 100% of students demonstrated an ability to understand and apply the manual (03/02/2014).

2. **Outcome:** Students will demonstrate effective verbal communication skills appropriate to the setting and audience (field/professional settings).

   **Criterion:** Scores for field communication skills will trend up across the curriculum when evaluating freshman, sophomore, junior, and senior OAL student field communication skills.

   **Result:** Scores for field communication skills improved across the curriculum when freshman, sophomore, junior, and senior OAL student field communication skills were evaluated.

OAL faculty are certified as instructor/trainers for these professional certifications, in addition to demonstrating adequate engagement with regional, national, and international professional associations; conducting adequate scholarly activity; and performing annual reporting as recorded in their annual Faculty Professional Activities Reports.

Other exemplary programs include Sociology, which requires a senior capstone and presentation as well as the ETS Sociology Major Field Test.

Examples of programs improved based on reviews include Early Childhood Development, Environmental Science & Policy, and Music, which have all demonstrated major commitments to improvement in 2015–16 based on issues identified in prior years' University Assessment Committee reviews.

## EDUCATION – EARLY CHILDHOOD DEVELOPMENT (ECD)

Instructors assess student achievement through courses, assignments, discussion forums, and formative and summative evaluations of student performance throughout the term. The final

capstone experience and portfolio in ECD connect to several knowledge, skill, and dispositional outcomes as follows:

1. **Outcome:** Capstone reflects ethical practices in early childhood education and development as well as the abilities to analyze and reflect on practice while drawing connections to research.

   **Criterion:** 100% score at least 40 points.
   **Result:** 90% students met goal.

2. **Outcome:** Portfolios from all seniors within the program will be assessed using a standard rubric.

   **Criterion:** 80% of the students in Portfolio Capstone class will receive a 3 or higher using the 4-point rubric.
   **Result:** Students received a 3.5 average on the rubric.

3. **Outcome:** Analyze and reflect on practice.

   **Criterion:** 100% score [no level was provided by the program].
   **Result:** 90% of students met goal (4/23/15).

4. **Outcome:** Explain how child observation and documentation are central to the practice.

   **Criterion:** 100% score at least 24 out of a possible 30 points.
   **Result:** Students did not meet goal (4/23/15).

Early Childhood Development Program actions based on assessment program review and mapping to SOU Program Goals include revising the ED 486/586 curriculum; revising teaching practices in ED 407/507; and revising assignments for ED 486/586.

Faculty members in the online ECD Program mainly comprise adjunct instructors. They are highly knowledgeable and experienced in their fields of study and maintain currency in their discipline by working in their early childhood professions. There is no funding for them to attend conferences or attain professional development in their disciplines, nor do they submit annual faculty professional activities reporting.

The coordinator is actively involved in local and statewide Early Learning Hub functions, meetings, and conferences. The coordinator regularly attends statewide meetings, such as GAS (Grand Articulation Summit) to maintain relationships and networking with community colleges and four-year institutions. The ECD Program has 14 articulation agreements with regional and state community colleges.

## ENVIRONMENTAL SCIENCE & POLICY PROGRAM (ESP)

Discipline-specific outcomes are assessed based on the program's core learning outcomes. The program currently maintains a series of assessments on research writing, annual knowledge, spatial literacy, data analysis, and oral communication in addition to a senior self-assessment. Key program outcomes include "knowledge of environmental sciences and processes"; "scientific communication"; "environmental analysis"; "environmental maps and modeling"; and "leadership and engagement." The annual knowledge assessment data are posted in TracDat under the "knowledge of environmental sciences and processes" outcome and associated results.

The Environmental Science & Policy Program has defined measurable outcomes and has direct assessments associated with them. The program has initiated several initiatives based on assessment data and is tracking results. For example, beginning in summer 2015, the ESP faculty began meeting to develop ways to improve writing and research across the program based on analysis of assessment results from the previous years. The program made stronger connections between two courses (ES 310 and ES 494c), which the faculty feel will improve writing and research ability. Depending on 2015–16 scores, the faculty may reevaluate assumed level of mastery in the rubric. For now, the faculty are paying particular attention to areas with low scores, such as "valid inferences."

The ESP Program has also developed a knowledge exam for assessing knowledge in program outcome areas. The assessment is categorized, allowing the program to see where it needs improvement. Designed exclusively as a tool for formative program evaluation, the exam was administered for the first time in February 2016 as a baseline. It will now be given to all entering first-year students and exiting seniors annually. While the program had hoped to identify a standardized exam to support evaluation against other programs, no such standardized test exists for environmental studies or environmental sciences.

Programmatic outcomes, criteria, and results are as follows:

1. **Outcome:** Students will be able to define and describe the fundamental scientific processes and major national/international laws or protocols relevant to environmental problems in the natural sciences, physical sciences, and social sciences.

   **Criterion:** All graduating seniors will score 60% or higher in all areas of assessed knowledge. Students will show improvement over the course of four years.

   **Result:** Graduating seniors scored above 60% in five of six areas of assessed knowledge. Students scored a 51.4% in the research knowledge category. Mean student scores improved in each of the four years assessed for all six categories (03/04/2016).

2. **Outcome:** Students will communicate effectively about environmental issues in writing, speech, and visual images.

**Criterion:** ES 210, ES 310, and ES 494 (taken in sophomore, junior, and senior years) each require a term-long research paper. Three faculty members assess each paper against a standard rubric. Communication quality is assessed and reported annually across these courses. The objective is that 75% of students will score 3 or higher on all areas of research and writing assessment. No student will score below 2 on any area of the writing assessment.

**Result:** 2015–16 scores are presently available only for ES 310. The percentage of students mastering the material at the junior year has increased, which is thought to be the result of curricular revision. Scores ranged between 28.5% and 78.6% mastery.

**Criterion:** 75% of students meet senior oral writing presentation proficiency according to the AAC&U scoring rubric for senior scientific oral communication at the annual SOAR event.

**Result:** In 2015, 97.5% of ES students met or exceeded proficiency on the senior oral presentation scoring rubric.

3. **Outcome:** Students will be able to analyze hypotheses and environmental problems using statistical and data analyses.

   **Criterion:** On term-long data analysis task (demonstrating proficiency in scientific data analysis) in ES 386, 75% of students score at the level of "mastery" or higher in all areas of data analysis assessment.

   **Result:** Data analysis rubric scores ranged from 47% mastery to 80% mastery. Lowest reporting scores are in appropriate sampling strategies.

4. **Outcome:** Students will be able to construct temporal and spatial models of complex environmental problems as well as to interpret maps and spatial data of natural resource issues.

   **Criterion:** 75% of students meet proficiency (3 or higher) in all areas of assessment based on the standard ESP geospatial rubric used to evaluate culminating geospatial visualization and data project.

   **Result:** 2015 spatial analysis rubric scores ranged between 20% and 47% mastery. Scores were substantially lower.

## MUSIC

The Music Program uses the ETS Major Field Test in Music to assess knowledge outcomes that demonstrate student proficiency in theory, history, and repertory in the major field of study:

1. **Criterion:** Seniors score at the median (150 or better).

   **Result:** Graduating seniors completed the ETS Major Field Test in Music on May 20, 2016. With an average score of 151.5, the program achieved its goal of meeting or

exceeding the national median. This is an improvement over AY 2014–15. Students scored weakest in music history (content covered in MUS 360 and 361). In fall 2016, the program will create a Music History Task Force to review curricula and propose changes for implementation. Additionally, the program is changing its proposed MUS 460 to expand students' knowledge base in music history.

2. **Outcome:** Demonstrate knowledge of the theory, history, and repertory in the major field of study.

   **Criterion:** Students will pass juries with an average rating of 3 or higher.

   **Result:** Faculty in brass used rubric for assessment in this area, and students met faculty expectations. Rubrics are being developed for percussion, woodwinds, piano, and voice.

3. **Outcome:** Identify how specific technologies serve the student's chosen field of music.

   **Criterion:** Seniors will score at the median (150.0) or better on the ETS Major Field Test.

   **Result:** Graduating seniors completed the ETS Major Field Test in Music on May 20, 2016. With an average score of 151.5, the program achieved its goal of meeting or exceeding the national median. This is an improvement over AY 2014–15. Students scored weakest in music history (content covered in MUS 360 and 361). In fall 2016, the program will create a Music History Task Force to review curricula and propose changes for implementation.

4. **Outcome:** Preparedness for professional career and/or graduate school.

   **Criterion:** Students will earn an average rating of 4 or better on their capstone final projects.

   **Result:** Criterion not met. Using the Capstone Rubric, faculty met in February 2015 to conduct the assessment. Three of the four capstones were considered "developing." One capstone was rated exemplary. The previous rubric was not developed using a consultative process, so new rubrics are being designed with five goals for improving student performance. The Music Program is also implementing student ePortfolios for collection and assessment.

5. **Outcome:** Demonstrated knowledge of the professional work in music, including career development skills, teaching skills, and concert attendance.

   **Criterion:** Students must successfully pass 10 quarters of MUS 165 Convocation/Concerts prior to graduation (consists of weekly meetings) and attend a number of required concerts each term.

   **Result:** Of the 15 students enrolled in MUS 400 Capstone, 9 were expected to meet the requirement and 6 had no possibility of fulfilling the requirement since they did not enroll. A greater than 95% passing rate for students who enroll in Convocation

suggests failure to meet these criteria is attributable to students not registering for the course. The faculty identified three strategies to implement in AY 2016–17 to ensure all graduate seniors enroll in the correct courses.

6. **Outcome:** Demonstrate mastery of the core fundamentals, processes, elements, form, structures, and styles of music.

    **Criterion:** Successful completion of ETS Field Test in Music with score at median (150.0) or better.

    **Result:** Graduating seniors completed the ETS Major Field Test in Music on May 20, 2016. With an average score of 151.5, the program achieved its goal of meeting or exceeding the national median.

    **Criterion:** Demonstrated ability of the rudiments of their instrument; demonstrated ability to read music at the third-year music major level (level 7 out of 9 reading standard); demonstrated ability to prepare a selection of repertoire for their instrument without a teacher; demonstrated knowledge of two years of repertoire for the instrument.

    **Result:** In 2015–16, enforcement of enrollment in MUP 292 was substantively increased. The faculty member teaching the course and the program chair worked together to contact students to remind them of the enrollment requirements. Many of the juniors and seniors who had not passed the exam were among those who had circumvented the requirements for ongoing enrollment in MUP 292. As 2016–17 approaches, the following strategies will be used:

- Continued reminders from the professor and chair about the requirement for ongoing enrollment until passage of the piano proficiency exam.
- Addition of requirement for music education students to have passed the piano proficiency exam as a condition of enrollment in MUS 352 Techniques in Accompanying for Music Educators.
- Increased monitoring of advisee enrollment in required courses (MUS 165 and MUS 292) by faculty. See Piano Proficiency Exam Report May 2016 in document repository for full report. Result type is "criteria met" because enrollments increased. Result type will include addition of strategies noted above for 2016–17 (05/23/2016).

7. **Outcome:** Perform a cross-section of the repertory in the major area of study.

    **Criterion:** Participate in a variety of ensemble experiences throughout the year; upon applying for graduation, student ensemble participation will be reviewed and measured as follows:
    - Beginning: Successful completion of 6–9 credits of varying ensembles.
    - Developing: Successful completion of 10–13 credits of varying ensembles.

- Accomplished: Successful completion of 14 or more credits of varying ensembles.

**Result:** Of the students enrolled in MUS 400 Capstone, three students met the Beginning level, successfully completing fewer than 10 credits of ensemble; three students met the Developing level, successfully completing 10–13 credits of ensemble; and nine students met the Accomplished level, successfully completing 14 or more credits of ensemble. See Ensemble Participation Report May 2016 for a complete report and plans for improvement and implementation for AY 2016–17.

Music faculty maintain currency in their fields by providing service; completing scholarship; performing; and attending annual meetings of and holding officer duties for national and international professional associations. Associations and entities for which Music faculty perform; hold office or attend; and adjudicate performances include the North American Saxophone Alliance; National and Regional Meetings of the Saxophone Alliance; International Clarinet Society; World Saxophone Congress; Chengdu Saxophone (China); National Association for Music Education (NAfME); American Choral Directors Association; National Association for Teachers of Singing; American Guild of Organists, the ACDA Northwest Division; Percussive Arts Society International Convention (PASIC); *Percussive Notes*, the research journal of the Percussive Arts Society; Britt Arts and Music Festival; Oregon Music Education Association; and National Association for Music Education.

## *Standard 4.A.1 – CTI 3.1.1*

| Core Theme 3: Responsible Citizenship | Through academic and student affairs, students will be prepared for personal and social responsibility, locally and globally. |
|---|---|
| Objective 1 | Apply knowledge, skills, and ethical inquiry to practical problems locally and globally. |
| Indicator 1 | Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education. |

Indicator Status: Not met

| Value-Added Percentile Ranks | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 2008–09 | 2009–10 | 2010–11 | 2011–12 | 2012–13 | 2013–14 | 2014–15 | 2015–16 (CLA+) |
| Total CLA Score | 86 | 77 | 89 | 98 | 90 | No admin | No admin | 33 |

Data only partially address this core theme and indicator, but they do still touch on aspects of this theme in a measurable way. CLA scores from 2009–13 met the overall target for value-

added gain of an SOU education but do not provide additional data regarding objectives or themes associated with this core theme or indicator. In the 2015–16 administration of the CLA, customized questions seeking to assess service work, real-world problem solving, exposure to cultural diversity, and development of ethical and moral standards yielded the following results from seniors:

- 69% performed service work while at SOU
- 58% thought they addressed real world problems "quite a bit" or "very much" as part of their education
- 58% were introduced to cultural practices or worldviews at SOU that differed from their own
- 63% further developed their ethical/moral standards

Although the targeted rate of 70% was not met, outcomes mapped by academic support programs—including assessment of activities performed by Student Life, First-Year Orientation, identity resource centers, and other entities that provide cocurricular programming—suggest students gain significant exposure to knowledge, skills, and dispositions that refer directly to this theme. As demonstrated below, 32 programs identified 95 outcomes related to Strand I: Responsible Citizenship, while 89 outcomes from 34 programs related to understanding worldviews and cultural perspectives that differ from students' own.

| Support Program Themes | Outcomes Mapped | Programs Represented |
|---|---|---|
| CT 3.1/Strand I: Responsible Citizenship – Apply knowledge, skills, and ethical inquiry. | 95 | 32 |
| CT 3.2/Strand J: Responsible Citizenship – Understand and respond responsibly to worldviews and cultural practices different from one's own. | 89 | 34 |

*Standard 4.A.1 – CTI 3.1.2*

| Core Theme 3: Responsible Citizenship | Through academic and student affairs, students will be prepared for personal and social responsibility, locally and globally. |
|---|---|
| Objective 1 | Apply knowledge, skills, and ethical inquiry to practical problems locally and globally. |
| Indicator 2 | Students in House cohorts and the Honors College will demonstrate the ability to solve a local problem and extend that solution to a global level. |

Indicator Status: Met

Community engagement at the local, regional, and international levels is integrated into the curriculum in a variety of ways. Examples include courses with special emphasis, such as those in House Seminar (HSEM) and the Honors College. The House Seminar is a distinctive and challenging student experience that fosters resilience, adaptability, team skills, career awareness, and problem solving. Complementing their traditional academic major, this interdisciplinary curricular structure comprises classes and other experiences centered on "big ideas" such as social justice and environmental sustainability. Faculty, students, and staff collaborate across conventional majors to create novel academic experiences that involve active learning, research, performance, adventure, career mentoring, and real-world application. Each term, all HSEM students and faculty participate in House Seminar, a "home room" class that, over three years, delivers foundational academic skills; academic advising; peer mentoring; group projects; lab/field work or performance; field trips; career preparation; portfolio/résumé building; professional conference participation; and research publication. Houses include engagement courses (199, 299, 399) corresponding with 100-, 200-, and 300-level general education courses.

HSEM courses offer experiential learning across diverse course themes, providing a "lab" or experiential learning component related to classroom course content. Students in the Social Justice House, for example, have engaged as volunteers and participants with local organizations and events such as the Northwest Seasonal Workers Association, Jackson County Fuel Committee, and on-campus social justice conferences. In 2015, the students studied homelessness and traveled to the Oregon State Legislature. Green House students have volunteered at ACCESS, which provides food, housing assistance, and weatherization services to the needy in our community. They also actively participate in projects at the SOU Center for Sustainability such as developing a water management plan for the center. [Exhibit 4.A.1 HSE 199 Access Reflection]

The third-year course in the Green House (HSE 303 Diversity & Global Awareness) explores institutions, assumptions, and values from national and global perspectives through an

understanding of society as complex, contested, and dynamic; varied worldviews and cultural practices; how historical economic, social, and political conditions affect cultural values and beliefs; and dynamics of power in the world situation from global perspectives. [Exhibit 4.A.1 Green House 303 Diversity & Global Awareness Syllabus]

House engagement activities for AY 2015–16 included:

- House Experience went on 67 off-campus adventures. Students and faculty walked, took the bus, drove SOU vans, volunteered their personal vehicles, and even rode bicycles to get to their destinations.
- As part of their trips and activities, House students donated time out in the community or performed volunteer services with on-campus entities. Of the 92 total events and projects completed by the House Experience this year, 28 of them were volunteer/service learning experiences.
- Of those 92 total events, over one third (32 events) occurred outdoors. The closest distance away from campus for a field trip was 0.2 miles to Glenwood Park. The furthest distance from SOU was 358 miles to Portland. The longest field trip was four days and three nights from Ashland to the Warm Springs Reservation to Portland.
- Six other extended field trips were made, two of which were overnight.
- The House Experience students and faculty attended 10 live performances or lectures and watched five films.
- Eight class research/data gathering field trips were recorded for the House Experience.
- House students and faculty attended two conferences and one board meeting as well as participating in SOAR.

Similarly, students in the Honors College are engaged in community-based learning courses and other applied opportunities as cocurricular supplements to their classroom instruction. Many of these learning activities address local and global problems.

To be admitted to the Honors College, applicants must demonstrate the following attributes related to global citizenship:

- awareness of regional, national, and international issues and current events;
- awareness of where they have made a difference in the lives of others and where they could make a difference if given the time and resources;
- dedication to service and demonstration of engagement in the community;
- intellectual and emotional connection to the global community;
- willingness to use and develop skills in collaboration, conflict resolution, and democratic decision making; and
- desire to make a positive difference in the world (e.g., social justice, environmental sustainability, health care, education, artistic contributions).

Honors College curricular and cocurricular activities address problems with local, regional, and global implications. These applied opportunities include projects students conduct as a part of their "Take the Lead Project" requirements; internships; and participation in conferences of the National Collegiate Honors Council (NCHC) and Western Regional Honors Council (WRHC) as well as in the American Democracy Project. In addition to engaging in these projects, students are also paired with mentors from the community. [Exhibit 4.A.1 Community Mentor Program] In HON 317 Politics, Institutions, and Society, topics include national and legal issues. In HON 315 Art, Culture, and Humanities, students develop personal narratives as they relate to global issues [Exhibit 4.A.1 HON 317 The American Century Syllabus] and [Exhibit 4.A.1 HON 315 Art Culture and Humanities Syllabus].

### Standard 4.A.1 – CTI 3.1.3

| Core Theme 3: Responsible Citizenship | Through academic and student affairs, students will be prepared for personal and social responsibility, locally and globally. |
| --- | --- |
| Objective 1 | Apply knowledge, skills, and ethical inquiry to practical problems locally and globally. |
| Indicator 3 | Students will self-report on the NSSE the number of opportunities to engage in Enriching Educational Experiences (NSSE Benchmark: Enriching Educational Experiences (EEE)) and community-based learning experiences while enrolled at SOU (NSSE Benchmark: ACL). Results will be consistent with or exceed 2009 findings. |

Indicator Status: Target met

The Enriching Educational Experiences (EEE's) tracked in 2009 were:

- Participation in cocurricular activities (e.g., organizations, campus publications, student government, social fraternity or sorority); community service and/or volunteer work.
- Practicum, internship, field experience, co-op experience, or clinical assignment.
- Foreign language coursework or study abroad.
- Independent study or self-designed major.
- Culminating senior experience (e.g., Capstone course, senior project or thesis, comprehensive exam)
- Serious conversations with students of different religious beliefs, political opinions, or personal values.
- Serious conversations with students of a different race or ethnicity than student's own.
- Using electronic medium (e.g., listserv, chat group, Internet, instant messaging) to discuss or complete an assignment.

- Campus environment encouraging contact among students from different economic, social, and racial or ethnic backgrounds.
- Participation in a learning community or some other formal program where groups of students take two or more classes together.

Results from the 2012 NSSE Benchmarks report were aggregated in the same manner as the 2009 report. Numbers from both reports are included in the table below. The latest NSSE data available are from 2014. The factors grouped in the EEE section have been rearranged into other sections. While direct comparisons are not possible, some generalizations may still be made about how the students describe their experience in these areas. The overall institutional Snapshot report for 2014 indicates 54% of seniors responded "Very much" or "Quite a bit" to gains made in "Understanding people of other backgrounds (economic, racial/ethnic, political, religious, nationality, etc.)."

The 2014 NSSE results included in the table below come from two reports: the Engagement Indicators (*Discussions with Diverse Others*) and High Impact Practices (HIPs). NSSE asks students about their participation in the six HIPs listed below. The report provides information on the first three practices for first-year students and all six for seniors. Unlike most questions on the NSSE survey, the HIP questions are not limited to the current academic year. Thus, seniors' responses include participation from prior years.

1. Learning community or some other formal program where groups of student take two or more classes together.
2. Courses that included a community-based project (service-learning).
3. Work with a faculty member on a research project.
4. Internship, co-op, field experience, student teaching, or clinical placement.
5. Study abroad.
6. Culminating senior experience (e.g., Capstone course, senior project or thesis, comprehensive exam, portfolio).

|  | First-Years | NSSE | Seniors | NSSE |
|---|---|---|---|---|
| Enriching Educational Experiences (2009) | 27.3 | 28.0 | 39.8 | 40.8 |
| Enriching Educational Experiences (2012) | 25.7 | 28.4 | 39.4 | 40.4 |
| Discussions with Diverse Others | 42.2 | 40.9 | 39.7 | 41.8 |
|  | First-Years | NSSE | Seniors | NSSE |

| | | | | |
|---|---|---|---|---|
| Learning Community | 19 | 15 | 19 | 24 |
| Service Learning | 65 | 51 | 63 | 61 |
| Internship | | | 52 | 50 |
| Study Abroad | | | 8 | 14 |
| Culminating Senior Experience | | | 64 | 46 |
| Participated in at least one HIP | 67 | 58 | 87 | 85 |
| Participated in two or more | 19 | 12 | 67 | 62 |

Based on these figures, it appears SOU student responses were just below the NSSE averages for enriching experiences in 2009 and somewhat lower in 2012 but were higher for most related elements in 2014.

### *Standard 4.A.1 – CTI 3.1.4*

| Core Theme 3: Responsible Citizenship | Through academic and student affairs, students will be prepared for personal and social responsibility, locally and globally. |
|---|---|
| Objective 1 | Apply knowledge, skills, and ethical inquiry to practical problems locally and globally. |
| Indicator 4 | Report total number of courses requiring community-based learning; report total number of student credit hours earned annually in CBL courses. |

Indicator Status: Target met

SOU students have the potential to engage with the community in at least 75 research and internship courses offered across the curriculum. For the academic year 2015–16, seniors completed nearly 2,500 student credit hours in research and Capstone courses and almost 2,000 student credit hours in internships. With each credit hour of internship representing 30 hours spent in local or regional businesses; schools; nonprofit organizations; or social service agencies, our students were actively engaged in the community for 59,760 hours. Sophomores

and juniors spent another 17,970 hours in internships. [Exhibit 4.A.1 CBL Practicum and Internship Report]

In addition to research and internship courses offered in the major, students completed another 5,500 credit hours in University Studies (general education) courses in Citizenship & Social Responsibility (Strand I). [Exhibit 4.A.1 Citizenship and Social Resp Course Schedule Report] These courses assess students' ability to "understand and apply moral standards to individual conduct and citizenship through ethical inquiry, social awareness, and civic engagement."

Senior-level courses in other academic programs with a strong engagement component include:

- Human service majors complete at least 270 hours of practicum working with diverse populations in social service agencies throughout the Rogue Valley. Students enjoy direct exposure to local and global issues as well as attending a weekly seminar to discuss and analyze their experiences. Many students become employed at these agencies or return to these positions following graduate school. [Exhibit 4.A.1 PSY 409B Practicum Human Service]

- Elementary education students are involved in community-based learning during their junior and senior years. All majors complete 150 hours of practicum by volunteering in area schools and education programs. During their senior year, students work on capstone/practicum/internship projects or are placed in schools as pre-service teachers. The capstone settings include schools and community organizations such as Hearts with a Mission, the Maslow Project, and Listo. Senior degree students spend about 100 hours working on their capstone projects within their organizations and creating a significant product, which is then shared at SOAR. Seniors earning their teaching license begin working full-time in the schools the last week of August. They move to a two- to three-hour commitment daily during the fall term (Practicum), a four-hour commitment in winter term (Half-Day Student Teaching), and Full-Day Student Teaching during spring term.

- The Spanish Program explicitly engages students in addressing problems locally and globally through several core and elective courses that examine issues in the Spanish-speaking world. In addition, Spanish majors are strongly encouraged to study abroad and participate in internships or other work experience abroad. All majors are required to complete a practicum experience (SPAN 406/408) and carry out 120 hours of community work in Spanish. Students file a statement of work and learning objectives with their academic supervisor; write reports and journals; and secure a written evaluation from the work supervisor.

- For the Native American Studies (NAS) minor and certificate programs, students must complete 4 credit hours of practicum, the specific content of which is developed with a

faculty member. Through these practica, students address real issues using the disciplinary tools of NAS.

- In the School of Business, community-based learning occurs mainly through internships (BA 409/402) [Exhibit 4.A.1 BA 402 409 509 Internship Practicum Syllabus] and Applied Business Research (BA 428). [Exhibit 4.A.1 BA 428 Business Research Syllabus] The program curriculum requires all majors to complete either a 120-hour internship or the research course. [Exhibit 4.A.1 Student Internship Handbook] At the conclusion of the internship, the employer completes an assessment of the student's performance. [Exhibit 4.A.1 Business Internship Employer Feedback Analysis] In BA 428, students conduct survey research for local clients in groups of three or four. Each group submits a formal research report and presents their findings to the client. This past year, a study MBA students conducted into the hazards of distracted driving resulted in recommendations for driver education. The Oregon Department of Transportation intends to incorporate this work into future campaigns to help curtail driving while texting or using a cell phone.

- The Criminology & Criminal Justice (CCJ) Program accepts as practicum sites all Oregon agencies directly involved in the justice system: courts; police (including forest and park service police); forensics units; district attorney offices; probation and parole services; coroner's offices; and jails and other corrections facilities. CCJ also approves social service agencies such as Children's Services, supervised parent visitation programs, and senior services as well as private organizations that provide domestic violence intervention programs; drug and alcohol counseling services; homeless shelters and services; and at-risk youth intervention (including residential treatment programs, YMCA, YWCA, and Boys and Girls Clubs). Finally, the program approves projects with elementary, middle, and high school at-risk youth such as alternative school programs. [Exhibit 4.A.1 CCJ 409L Practicum Internship Syllabus]

- The Psychology Program's two-course Capstone experience (PSY 498 and 499) incorporates significant community involvement through practicum and project activities carried out in local social service agencies. Approximately two-thirds of the psychology majors participate in these local activities, while the remainder opt to conduct research projects addressing more global problems. [Exhibit 4.A.1 PSY 498 Capstone for Psych Majors] and [Exhibit 4.A.1 PSY 499 Capstone for Psych Majors]

- In Sociology & Anthropology (SOAN), one key learning outcome is to practice ethical and civic engagement. As a result, senior capstone work (along with the work done in core courses leading to the capstone) is typically applied and problem-driven. Program assessment includes applying a civic engagement rubric to capstone work.

While only certain academic programs tied senior-level assessment and specific learning outcomes to connected learning, community-based learning, or service learning opportunities, many programs offer courses at all curricular levels that promote citizenship, social awareness, and examination of practical problems.

Through USEM or exposure to the extensive engagement component of the House Seminar, all first-year students are introduced to global, national, and local problems with social, economic, geopolitical, and environmental dimensions. In USEM, this is achieved through the themed sections of the yearlong USEM 101–103 series. Several sections involve students participating in community-based projects and research around topics such as homelessness and housing; food security; social justice; and developing a sense of personal ethics.

Several programs include a service learning or civic engagement component as a degree requirement. For example, to graduate with a minor in Gender, Sexuality, & Women's Studies, all students are required to take GSWS 410: Feminist & Queer Theory in Action, a Capstone/Practicum course that requires all students "to engage in 30 hours of projects or placements that may include service learning, community-based learning, or independently devised individual or group projects involving social and cultural action on issues related to gender, sexuality, and/or women/girls. In-class time is divided between analyses of diverse feminist and queer theories and activism and collective discussion of student projects." Similarly, the Environmental Science & Policy Program explicitly identifies local and global problem solving within its mission and objectives. All students are required to participate in a community-based practicum or internship and participate in a community-based research project for their capstone experience. [Exhibit 4.A.1 ES 494C Env Studies Capstone]

The Early Childhood Development Capstone series engages students in community-based service learning. All students are required to plan and implement a meaningful service project in their community. At the project's conclusion, students evaluate the outcome and assess their own learning. [Exhibit 4.A.1 ED 409A Capstone Practicum – Internship CBL] and [Exhibit 4.A.1 ED 409 Capstone Practicum – Internship Portfolio Syllabus]. Chemistry majors develop relationships with local businesses as part of their capstone activities. For example, a student who is currently a brewer for Anderson Brewing worked as an intern with Standing Stone Brewery. Her work at Standing Stone led to a published manuscript in the Master Brewers Association of the Americas technical quarterly titled "The Analysis of Green-Beer Flavors Using Liquid-Liquid Extraction and GC-MS." The Master Brewers Association awarded her article the Inge Russell Best Paper Award in 2013.

Biology offers students extensive opportunities for connected learning, ranging from applied curriculum in practica and capstone to foundational curriculum. Upper division biology students regularly find internship, capstone, and job opportunities with local health-related institutions, schools, and agencies (e.g., Providence Hospital; Rogue Valley Medical Center; Ashland Community Hospital; Allergy and Asthma Center; Oregon Health & Science University (OHSU); Medicap Pharmacy; numerous veterinary and private health clinics; Nielsen Labs; Ashland School District; Grants Pass Middle School; Jackson County Animal Shelter; Wildlife Images; Bureau of Land Management; US Forest Service; US Fish & Wildlife Service; and Oregon Department of Fish & Wildlife).

At all levels, biology courses engage students in problem solving related to local and global issues, focused particularly on the local bioregion. Individual courses analyze topics related to social issues such as global human population growth (BI 103 General Biology – Populations; BI 212 Evolution & Diversity; BI 340 Introductory Ecology; BI 438 Conservation Biology); status of women (BI 382 Biology & Society; BI 385 Women in Science; BI 438 Conservation Biology); the relationship between biomedical research and the cost of health care (BI 351 Microbiology; BI 361 The New Sciences of Complexity; BI 362 Topics in Anatomy & Physiology; BI 382 Biology & Society; BI 456 Immunology); ethics in genetics and biotechnology (BI 211 Molecules, Cells, & Genes; BI 212 Evolution & Diversity; BI 341 Genetics; BI 382 Biology & Society; BI 425 Molecular Biology); the limits of science in societal decision making (BI 340 Introductory Ecology; BI 388 Conservation of Natural Resources; BI 438 Conservation Biology; BI 450 Fish & Fisheries; BI 475 Aquatic Ecology); and the tension between habitat protection and economics for indigenous peoples (BI 340 Introductory Ecology; BI 388 Conservation of Natural Resources; BI 438 Conservation Biology; BI 450 Fish & Fisheries). Knowledge and understanding of these and related issues are typically assessed within individual courses using a variety of tools, including exams, essay assignments, written reviews of scholarly articles, and oral presentations.

Outdoor Adventure Leadership and Health & Physical Education are also exemplars in connecting students to engagement opportunities. The OAL curriculum engages students in a full year of community-based learning and emphasizes experiential learning throughout its curriculum. All OAL field-based classes stress real-life problem solving (as individuals and in groups), including field study focused on local river and stream resources, natural history, and international opportunities. Community-based engagement for HPE majors includes a wide range of local organizations (e.g., Ashland YMCA, SOU ROTC, Soccer, Fitness Center, Athletic Cage, Weight Room, Outdoor Program, Softball, Football, Lacrosse, Wrestling, Athletic Training, Nutrition/Fitness, Women's Resource Center), Dos Palos High, RASA Yoga, Boise Cascade, Ashland High School, Ashland Middle School, Phoenix High School, Sharp Energy Solutions, Tough Gym, LePari's, Superior Athletic Club, Lone Pine Elementary, Wilson Elementary, College of the Siskiyous, Club Northwest, Earth Monkey's Bootcamp, Howard Elementary, Rogue Valley Manor, Jared Anderson DDS, Willow Witt Ranch, Ashland Community Hospital, Natural Aspects, Target Pharmacy, Crater High, James B. Castle High, Ketchikan School Age Program, Rogue Valley Medical Center, Kids Unlimited, North Jackson Volleyball Club, Cascade Basketball Camp, McLoughlin Middle School, Jackson County Fire Department, Kennedy Elementary, Carmel Valley Tennis Camp, Lost River High, Ashland Parks & Recreation, Kids Unlimited, Hidden Valley High, Looking Glass Elementary, Helping Hands International, Choices, Associates for Oral & Maxillofacial Surgery, Shasta Regional Medical Center, Skylark, Jackson County Physical Therapy, Medford Parks & Recreation, Ashland Physical Therapy, In Motion Studio, Providence Medical Group, Lava Lanes, Southern Oregon Gymnastics Academy, Synergy Physical Therapy, Kleiman & Stamper Physical Therapy, Royal Gardens, Special Olympics Swimming, Sisters Parks & Recreation, Aaron Anders Physical Therapy, Roots & Wings Child Development, Jackson County Community Justice, South Middle School, Turning Point Physical Therapy, and Aerospace Ashland.

Economics majors are introduced to local and global problem solving in EC 202 Macroeconomics, and they continue honing this ability in EC 320 Introduction to the International Economy. [Exhibit 4.A.1 EC IS 320 Intro to the Intl Economy Syllabus] Students who choose to take EC 379 Economic Development enjoy enhanced exposure to addressing global problems, while students who take EC 325 satisfy the objectives for Strand I (Responsible Citizenship). Depending on the topic chosen for EC 494 Capstone Experience, students may get even further exposure to this objective. [Exhibit 4.A.1 EC325 Labor Economics Syllabus] and [Exhibit 4.A.1 EC 494 Capstone Syllabus]. Several English courses (WR 280 Introduction to Rhetoric, ENG 329 Grant-Writing, and ENG 410 Community Engagement Writing) offer students community-based learning opportunities to address local and global social issues. [Exhibit 4.A.1 WR 280 Rhetoric and Crime Lit Syllabus], [Exhibit 4.A.1 WR 329 Grant Writing and Workplace Literacy Syllabus], [Exhibit 4.A.1 ENG WR 410 CBL Writing Internship Practicum]

In Military Science, the ROTC curriculum engages students in community-based learning by providing opportunities to work with and train alongside Army National Guard soldiers as well as to coordinate community service projects. Past community-based engagement for ROTC students includes Jackson County Fuel Committee, Toys for Tots, and SOU Spring Cleanup.

While no specific community-based learning courses are required in the International Studies (IS) Program, students are strongly encouraged to study abroad and participate in internships or other work experiences outside the United States. Several core and elective courses address global problems by the very nature of the courses, and many of these courses serve as general education courses for University Studies Strand J (Diversity & Global Awareness).

In Communication, COMM 310 (Advanced Public Speaking) features a successful community-based learning assignment called the Disposition Charity Derby. Students each donate a dollar amount to the class pool. They then each select their favorite charity or nonprofit community agency and deliver a persuasive speech about the agency. The pool of donated funds is sent to the agency championed by the student voted the most persuasive speaker by their peers. COMM 475 (Organizational Communication) includes a final assignment designed to allow students to analyze the dynamics of an organization based on the theories and processes they learn in the course. [Exhibit 4.A.1 COMM 310 Adv Public Speaking Syllabus] and [Exhibit 4.A.1 COMM 475 Organizational Communication Syllabus]

Much of the Innovation & Leadership Program curriculum requires students to engage in community-based learning. In multiple courses—specifically COMM 475 Organizational Communication, BA 477 International Business, BA 428 Applied Business Research, EMDA 350 Projects in Digital Media, BA 399 Entrepreneurship in Organizations, and BA 409 Capstone—students are assigned the task of conducting a survey, designing a website, or interviewing employees at an organization to assess how to address problems locally and globally. [Exhibit 4.A.1 BA 477 Intl Business Syllabus], [Exhibit 4.A.1 BA 428 Applied Research Syllabus], [Exhibit 4.A.1 EMDA 350 Seminar Syllabus]

## Standard 4.A.1 – CTI 3.2.1

| Core Theme 3: Responsible Citizenship | Through academic and student affairs, students will be prepared for personal and social responsibility, locally and globally. |
| --- | --- |
| Objective 2 | Understand and respond responsibly to worldviews and cultural practices different from one's own. |
| Indicator 1 | 90% of all academic programs will identify within their program course offerings an emphasis on responsible worldviews and cultural practices as reported within the assessment management system (TracDat). |

Indicator Status: Target met

Currently, 37 of 40 (92.5%) undergraduate academic programs (including two Houses, the Honors College, and five minors) have mapped their program learning outcomes to the institutional theme of cultural diversity in TracDat. Five of the eight master's programs reporting in TracDat have completed this mapping, and all of them tied program outcomes to this theme (Strand J of University Studies Integrations goals). A total of 34 of the 37 undergraduate programs that have mapped their outcomes (92%) indicate at least one program outcome aligns with Strand J goals.

Students completed more than 6,600 credit hours in University Studies (general education) courses in Strand J (Diversity & Global Awareness) in 2015–16. A total of 44 different upper division courses in 17 disciplines was offered for Strand J credit during the year. [Exhibit 4.A.1 Strand J Course Sched Report] These courses assess students' ability to understand institutions, assumptions, and values from national and global perspectives.

Among the highlights reported by academic programs in this area are Gender, Sexuality, & Women's Studies' GSWS 410 Feminist & Queer Theory in Action, which directly links course material to SOU's Diversity Statement (GSWS 410 Syllabus, page 6) via the syllabus. [Exhibit 4.A.1 GSWS 410 Feminist and Queer Theory Syllabus] Cultural diversity and competence are assessed through the program learning outcome: "Students will demonstrate an awareness of the aims of social justice (e.g., as conveyed through discussions of intersectional feminism and queer activism)." The program's Assessment Committee uses a rubric to measure this outcome. [Exhibit 4.A.1 GSWS Outcome Assessment Results]

All History Program courses foster openness to cultural diversity. Courses on the history of the United States include detailed analyses of the experiences of the broad array of racial, ethnic, and cultural groups that have lived in the country. In a larger sense, part of the discipline of history's mission is to explain and analyze the experiences of peoples from all parts of the

world throughout the recorded past. All courses on areas outside the United States highlight global cultural diversity.

Diversity is integrated as a focus into classes throughout the Psychology curriculum and is an integral component of the core curriculum in the major. Psychology majors must choose one of the several courses that emphasize multiculturalism and responsible worldviews and cultural practices: PSY 369 Human Sexuality, PSY 465 Adult Development & Aging, PSY 479 Abnormal Psychology, PSY 487 Multicultural Psychology, PSY 489 Native American Psychology, PSY 492 Psychology of Women, and PSY 495 Lesbian & Gay Studies.

Several courses offered in Environmental Science & Policy specifically address cultural sensitivity, human rights, animal rights, and ethical research. Students are asked to develop research and content that is culturally appropriate for their capstone experience. [Exhibit 4.A.1 ES 423 Sustainability Natural Resources Syllabus]

The Human Service curriculum emphasizes working with and supporting diverse populations. Many of these core courses focus on responsible worldviews and cultural practices (PSY 409 Human Service Practicum [270 hours in local agencies]; PSY 475 Crisis Intervention; PSY 438 Group Dynamics [Exhibit 4.A.1 PSY 438 Group Dynamics Assignment]; SOAN 304 Poverty, Family, & Policy; SOAN 311 Community Studies; SOAN 312 Sociology of the Family; and SOAN 444 Organizational Sociology.

Elementary Education presents the concept of culturally responsive teaching and the skills needed to differentiate instruction to meet the needs of all learners in its ED 457 Curriculum and Instruction course. Other Elementary Education courses that engage diversity include ED 459 Philosophical Foundations of Education, which presents a variety of theories and research on styles of practice and respected leaders in the field; ED 460 Multicultural Education, which explores various cultural groups and the reality of equity in education; ED 415 Music for Teachers, which explores music from around the world to be integrated into classroom curriculum and instruction; ED 463A Reading Methods, which models the use of literature from many cultures; and ED 458 Social Studies Methods, which highlights the importance of diverse perspectives in the study of history and the social sciences.

The Early Childhood Development Program emphasizes responsible worldviews and cultural practices through courses such as ED 454 Advocacy and Leadership; ED 438 Children Around the World; ED 385 The Early Childhood Professional; ED 487 Family, School, & Community Relations; ED 348 Children with Disabilities; and ED 409 Capstone. Workshops also include extensive content on working with culturally and linguistically diverse children and families. [Exhibit 4.A.1 ED 486 Curriculum Content in Early Childhood Syllabus]

Not surprisingly, virtually all Language & Culture courses address cultural diversity while stressing responsible worldviews and cultural practices. Openness to cultural diversity is also reflected in course themes developed in many USEM sections. In the Criminology & Criminal Justice Program, CCJ 460 Comparative Criminal Justice engages students in looking at crime

from a broad, holistic perspective. [Exhibit 4.A.1 CCJ 460 Comparative Criminal Justice Syllabus] Economics introduces diversity as a learning objective in EC 202 Principles of Macroeconomics [Exhibit 4.A.1 EC 202 Principles of Macroeconomics Syllabus], EC 320 Introduction to the International Economy [Exhibit 4.A.1 EC IS 320 Intro to the Intl Economy Syllabus], EC 379 Economic Development [Exhibit 4.A.1 EC 379 Economic Development Syllabus], and EC 325 Labor Economics, which exposes students to the realities of labor market discrimination based on race, religion, gender, and national origin. [Exhibit 4.A.1 EC 325 Labor Economics Syllabus]

In ENG 491 History of the English Language, students learn about diversity in the English language as it pertains to communities of color and language discrimination. [Exhibit 4.A.1 ENG 491 591 History of English Lang Syllabus] ENG 443 Chicana/o Literature, ENG 454 Multicultural Literature of the US, and ENG 447 Major Forces in Literature focus on literature by people of color and the social/cultural problems they face as minorities in the United States. [Exhibit 4.A.1 ENG 447 Major Forces in Literature Syllabus]

Honors College students engage with issues that require openness to cultural diversity and address problems with local, regional, and global implications. These applied opportunities include projects students host as a part of their "Take the Lead Project" requirements; internships; and participation in conferences of the National Collegiate Honors Council and Western Regional Honors Council (WRHC) as well as in the American Democracy Project.

Military Science students are instructed once per term in the areas of the US Army's Sexual Harassment & Assault Response Program (SHARP); Master Resiliency Training Program (MRT); Suicide Prevention & Response; and Equal Opportunity (EO) & Equal Employment Opportunity (EEO). Students are required to adhere to these standards to participate in ROTC. Students in Sociology & Anthropology explore social and cultural diversity specifically in most classes, and many do so in great depth. A student survey administered in the Capstone course measures self-understanding of growth in this area. [Exhibit 4.A.1 SOAN Capstone Self Assessment Survey]

The OAL curriculum fosters an understanding of local, regional, national, and global issues, particularly in practicum activities that exemplify the applied aspect of student engagement in culturally diverse settings. Currently, the program is offering summer courses through international venues (Nepal 2016, South America 2017). In 2011 and 2012, summer offerings took place in Australia and New Zealand. These field experiences emphasize cultural, spiritual, and environmental exploration and offer students homestays, interactions with local guides, and visits to cultural and religious sites through which they gain cultural perspectives. Special teachings on Buddhism, Hinduism, and Tibetan practices in Nepal are used to prepare students for their pilgrimages to spiritually significant sites.

Political Science courses that foster responsible worldviews and cultural practices include PS 355 Global/Comparative Politics and PS 358 Terrorism. The global/comparative course emphasizes various interpretations of "development" and the biases and cultural assumptions embedded in each model while providing cross-national case studies for comparison of values,

institutions, and identity. Terrorism includes discussions of the cultural origins and dynamics of dissent, up to and including violent insurgency, by way of contextualizing terrorism within an environment of asymmetrical warfare. Themes of cultural resistance; globalization and its sociocultural impacts; and postcolonial struggle are integrated into models of insurgencies and terrorist movements.

### *Standard 4.A.1 – CTI 3.2.2*

| Core Theme 3: Responsible Citizenship | Through academic and student affairs, students will be prepared for personal and social responsibility, locally and globally. |
|---|---|
| Objective 2 | Understand and respond responsibly to worldviews and cultural practices different from one's own. |
| Indicator 2 | Students will self-report on the number of opportunities to engage in Enriching Educational Experiences (NSSE Benchmark: Enriching Educational Experiences (EEE)). Results will be consistent with or exceed 2009 findings. |

Indicator Status: Target met

See Standard 4.A.1 – CTI 3.1.3

### *Standard 4.A.1 – CTI 3.2.3*

| Core Theme 3: Responsible Citizenship | Through academic and student affairs, students will be prepared for personal and social responsibility, locally and globally. |
|---|---|
| Objective 2 | Understand and respond responsibly to worldviews and cultural practices different from one's own. |
| Indicator 3 | The Collegiate Learning Assessment (CLA) allows institutions to ask nine institutional-specific questions. SOU has a question in the CLA to determine students' perceptions of their personal development of ethical and moral standards as it relates to the ability to respond responsibly to worldviews and cultural practices different from their own. |

Indicator Status: Target met

Seniors taking the CLA in spring 2016 were asked to respond to the following question, Were you introduced to cultural practices or worldviews that differ from your own while at SOU? Nearly every student responded (99 out of 100 students), with more than half indicating

significant exposure to diversity (Very much, 32%; Quite a bit, 26%). These results were included in the Custom Questions. [Exhibit 4.A.1 CLA Custom Questions]

The second CLA question that pertains to this indicator is, "Did you further develop your ethical and moral standards during your time at SOU?" Nearly every student responded (99 out of 100 students), with more than 60% indicating significant exposure to diversity (Very much, 37%; Quite a bit, 26%).

## Summary: Standard 4.A.1

As noted in the table below, of the 24 Core Theme Indicators assessed for this self-study, 10 are considered fully met, 9 were partially met, and 5 were unmet. Assessments based on data from the Collegiate Learning Assessment were among the indicators most frequently unmet. Changes to this testing instrument and adoption of institutional processes such as writing and critical thinking assessments, however, mitigate these findings. SOU did fall short of its goal to achieve 70% senior-level writing and critical thinking proficiency. Improvements continue to be made in these areas, both individual programs and across the Institution, which suggest the goal can be met within a short timeframe. Collaborative skills goals were also only partially met. Institutionally, we have taken two steps to address these outcomes: 1) eliminate collaboration as a core theme indicator while maintaining it as an instructional strategy that supports other outcomes and 2) integrate new assessment strategies for both civic engagement/connected learning and cultural diversity by adopting new assessment tools designed by ETS. Areas in which SOU met goals, either wholly or in part, generally relate to the degree to which programs are adopting and articulating language and strategies connected to assessing core themes in individual courses, general curricular approaches, and program planning; consistent use of rubrics and other tools to assess student outcomes; and advancing goals related to responsible citizenship and diversity.

In the years since the close of the last accreditation cycle, we have made significant gains, which are reflected in the outcomes reported in this section. In the 2014–15 academic year and assessment cycle, we saw near 100% completion of the program self-studies, which provide us with a comprehensive overview of undergraduate programs' assessment and improvement activities. We have also successfully implemented the same activities into our academic support programs, including mapping outcomes to core themes and seeing these integrated into the services and activities of many support services and operations. We have two active assessment committees—one for academic programs and the other for academic support programs—that evaluate and report back to programs on their assessment work. We see these results informing planning and improvements in our programs.

In 2016–17, our focus will remain on conducting training and providing support for academic and nonacademic programs as well as on implementing the same strategies to enhance assessment among graduate programs. With respect to the latter, while fewer gains have been

made in devising outcomes, indicators, and assessment strategies than in the undergraduate programs, almost half of our 10 graduate programs are accredited by external accrediting agencies, and 8 of the 10 have identified outcomes and assessment plans. We anticipate full implementation of TracDat to record and track program-level outcomes for our graduate programs in the next academic year.

The table below summarizes the status of the 24 core theme indicators.

### *Status of Core Theme Indicators*

| Core Theme | Description | Indicator Status |
|---|---|---|
| Core Theme 1: Student Success | SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing intellectual and practical skills. | |
| Objective 1 | Communicate effectively using Standard American English in written and oral communication. | |
| Indicator 1.1.1 | Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education (written). | Partially met |
| Indicator 1.1.2 | Random sampling of exiting seniors' writing samples will indicate 70% of students meet or exceed senior-level writing proficiencies as defined by an institutional writing rubric. | Not met |
| Indicator 1.1.3 | Students will self-report the number of opportunities to practice writing on NSSE (NSSE Benchmark: Level of Academic Challenge (LAC)), and results will be consistent with or exceed 2009 findings. | Met |
| Indicator 1.1.4 | Students will self-report the number of opportunities to collaborate on NSSE (NSSE Benchmark: Active and Collaborative Learning (ACL)), and results will be consistent with or exceed 2009 findings. | Not met |
| Indicator 1.1.5 | As part of each program review, programs will define, design, and identify their embedded assessments to determine the degree of students' | Partially met |

| | | |
|---|---|---|
| | success at communicating effectively. Programs establish their criteria, gather the data, and prescribe actions necessary when criteria are not met. | |
| Objective 2 | Collaborate with others to achieve a common goal. | |
| Indicator 1.2.1 | The continuous development of collaborative skills will be assessed in the first-year seminar and at the exit point using a performance task and institutional rubric adopted by the AAC&U. | Partially met |
| Objective 2 | Collaborate with others to achieve a common goal. | |
| Indicator 1.2.2 | Students will self-report the number of opportunities to collaborate on NSSE (NSSE Benchmark: Active and Collaborative Learning (ACL)), and results will be consistent with or exceed 2009 findings. | Partially met |
| Objective 3 | Use critical and creative thinking to solve abstract and applied programs. | |
| Indicator 1.3.1 | Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education (critical thinking). | Partially met |
| Indicator 1.3.2 | 70% of graduating students meet or exceed senior-level critical thinking proficiencies as defined by an institutional rubric derived from the AAC&U critical thinking rubric. | Not met |
| Indicator 1.3.3 | As part of each program review, programs will define, design, and embed assessment to determine the degree of students' success at critical thinking. Programs establish their criteria, gather the data, and prescribe actions necessary when criteria are not met. | Partially met |
| Indicator 1.3.4 | Students will self-report the number of opportunities to practice writing on NSSE (NSSE Benchmark: Level of Academic Challenge (LAC)), and results will be consistent with or exceed 2009 | Met |

| | findings. | |
|---|---|---|
| Objective 4 | Access and use information resources effectively and ethically (information literacy). | |
| Indicator 1.4.1 | Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education (information literacy). | Not met |
| Indicator 1.4.2 | First-time, full-time freshman students' performance on an institutional assessment of information literacy will demonstrate a value-added gain of 10% or more as measured on a pre- and post-assessment. | Partially met |

| Core Theme 2: Intellectual Growth | Students and faculty will extend and refine broad-based general knowledge and specialized knowledge in one or more specific discipline(s). | |
|---|---|---|
| Objective 1 | Understand and apply knowledge within the arts, humanities, social sciences, and sciences as part of a University Studies curriculum. | |
| Indicators 2.1.1 & 2.1.2 | Through the use of embedded assessments, students will demonstrate a continued growth of broad general knowledge. University Studies faculty will maintaining currency in the discipline taught, including service to the departmental and institutional administrative, committee, and student support and retention activities (contributions will be reported annually in the Faculty Professional Activity Report). | Partially met |
| Objective 2 | Integrate and apply advanced knowledge and skills in one (or more) specialized area(s) of study. | |
| Indicators 2.2.1 & 2.2.2 | Students' knowledge in a specific (major) discipline will be assessed and evaluated by each program. Statistics on students' knowledge will be reported to the Institution on a regular schedule. Program-level outcome assessments may include content exams, capstone analyses, final projects, and portfolios. Programs will demonstrate (through their academic program review) a consistent pattern of students' academic growth in program outcomes at 70% or better. Major program faculty will make direct contributions to the local regional, national, and international societies through scholarly activity (contributions will be reported annually in the Faculty Professional Activity Report). | Met |

| Core Theme 3: Responsible Citizenship | Through academic and student affairs, students will be prepared for personal and social responsibility, locally and globally. | |
|---|---|---|
| Objective 1 | Apply knowledge, skills, and ethical inquiry to practical problems locally and globally. | |
| Indicator 3.1.1 | Collegiate Learning Assessment findings will maintain at 70% or above for value-added gains of SOU education. | Not met |
| Indicator 3.1.2 | Students in House cohorts and the Honors College will demonstrate the ability to solve a local problem and extend that solution to a global level. | Met |
| Indicator 3.1.3 | Students will self-report on the NSSE the number of opportunities to engage in Enriching Educational Experiences (NSSE Benchmark: Enriching Educational Experiences (EEE)) and community-based learning experiences while enrolled at SOU (NSSE Benchmark: Active and Collaborative Learning (ACL)). Results will be consistent with or exceed 2009 findings. | Met |
| Indicator 3.1.4 | Report total number of courses requiring community-based learning; report total number of student credit hours earned annually in CBL courses. | Met |
| Objective 2 | Understand and respond responsibly to worldviews and cultural practices different from one's own. | |
| Indicator 3.2.1 | 90% of all academic programs will identify within their program course offerings an emphasis on responsible worldviews and cultural practices as reported within the assessment management system (TracDat). | Met |
| Indicator 3.2.2 | Students will self-report on the NSSE the number of opportunities to engage in Enriching Educational Experiences (NSSE Benchmark: | Met |

| | Enriching Educational Experiences (EEE)). Results will be consistent with or exceed 2009 findings. | |

| Objective 2 | Understand and respond responsibly to worldviews and cultural practices different from one's own. | |
| Indicator 3.2.3 | The Collegiate Learning Assessment (CLA) allows institutions to ask nine institutional-specific questions. SOU has a question in the CLA to determine students' perceptions of their personal development of ethical and moral standards as it relates to the ability to respond responsibly to worldviews and cultural practices different from their own. | Met |

Standard 4.A.2 **The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty take a primary role in the evaluation of individual programs and services.**

Each academic and support program at SOU has a mission statement that aligns with its particular programmatic outcomes and the institutional mission. All of these outcomes are detailed in TracDat, along with appropriate means of assessment to evaluate them. Specifically, the academic programs define learning outcomes faculty members have developed and agreed upon. The faculty collect all data collected related to these outcomes and make all decisions impacting their program.

All programs hold at least one annual program retreat during which evaluation of program goals and outcomes occurs as well as planning for curricular or programmatic changes. Several programs meet to advance assessment endeavors more than once a year (either once per quarter or in June and September). In most programs, faculty collectively make decisions such as how to improve on or address concerns raised by the previous year's assessment report, although several programs also delegate to Assessment or Assessment & Curriculum Committees. In some cases, a program chair or coordinator manages the bulk of the work themselves, with feedback and input from program faculty. In such cases, UAC encourages greater program faculty participation by extending invitations to chairs and at least one additional faculty member in each program for Assessment Retreats and the meetings scheduled around feedback and action items following UAC's evaluation of annual program reports. In the 2015–16 assessment cycle, programs generated a comprehensive self-study structured to address accreditation outcomes and indicators, which seemed to result in greater

participation and more strategic reflection around program curriculum and outcomes than in previous years.

Standard 4.A.3 **The institution documents—through an effective, regular, and comprehensive system of assessment of student achievement—that students who complete its educational courses, programs, and degrees, wherever offered and however delivered, achieve identified course, program, and degree learning outcomes. Faculty with teaching responsibilities evaluate student achievement of clearly identified learning outcomes.**

As noted previously, all academic programs have programmatic learning outcomes explicitly stated and entered into TracDat. Programs use various means to communicate these outcomes to students, including advising materials, websites, syllabi, catalog copy, rubrics, and other printed or digital materials that address outcomes at course, program, and degree levels. Means of assessment are mapped to learning outcomes and documented in TracDat along with results, which are generally gathered and provided by teaching faculty as part of their regular instructional duties. In several programs (e.g., University & House Seminar; Chemistry; Sociology & Anthropology; Business Administration; and Psychology), faculty work to collectively assess and assign scores to students' work (most commonly senior capstones) outside of their regular instructional duties.

Environmental Sciences & Policy is one of the exemplary programs in this regard. In 2014, as a result of continued growth and expansion in both the program and the private and public sector industries associated with it, the program changed its curriculum significantly. Degree requirements—as well as brief narratives describing the structural logic of the program's curriculum, outcomes, rubrics, and other instruments used for assessment—are found on the program's website and advising materials; in the DegreeWorks advising software; in promotional materials; and in their regularly distributed program newsletters.

The Business Administration Program takes a similar approach, articulating learning outcomes, assessment methods, student performance, and changes made as a result of assessment in their advising and promotional materials as well as in a PowerPoint slide presentation. [Exhibit 4.A.1 Business Learning Outcomes] Program learning outcomes (PLOs) are clearly linked to course activities and curricular components in syllabi. The following, for example, appears in the BA 427 syllabus:

| Course Learning Outcomes | PLO | Assessment Tools |
|---|---|---|
| To identify strategic business issues and develop plans for implementing solutions and communicating those solutions. | 1A, 1B, 2A, 2B, 2C, 3A, 3B, 3I, 3J, 3K 4A, 4B, 5A | Text Readings BSG Simulation |
| To complete the industry, target market, competition, and strategy sections of the student business plan that will be completed in BA499. | 1I, 2A, 2B, 2J, 2K, 3A, 3B, 4A, 5A | Research and Completed Drafts |

| Course Learning Outcomes | PLO | Assessment Tools |
|---|---|---|
| To better understand revenue-cost-profit relationships, to develop confidence using financial statements, and to better comprehend the connection between strategy and financial performance through participation in a business simulation. | 1L  2D | BSG Simulation |
| To see the big picture about businesses and comprehend the ambiguous nature of developing strategy and associated business plans. | 1A, 1B, 1C  4A, 4B | Written Case Analyses |
| To expand your ability to research, analyze, think creatively, and problem-solve. | 1A, 1B, 1C,  1L, 2B | Drafts of IA, TM, Competition & Strategy |
| To better judge and become more responsible for the quality of your work. | 5D | BSG Simulation – Peer Review  Discussion Forum |
| To build confidence working on projects without a clear outcome or "right" answer. | 4A  5D | BSG Simulation |
| To improve and further develop teamwork, collaboration, and leadership skills. | 4A  5D | BSG Simulation  Discussion Forum |
| To become more conscious of ethical principles and socially responsible practices. | 5A  5D | BSG Simulation  Team Work |
| To use tools and concepts learned in other business courses. | 1L | BSG Simulation  Text Readings  Discussion Forum |

The program conducts assessment of overall program learning outcomes in individual courses, including BA428, BA409/402, BA427, and BA499. The BA 428 Business Research Plan, for example, requires students to conduct a research project for a business in the community and present those results to the business. Students are evaluated on their ability to collect and analyze data; writing and oral presentation skills; and research aptitude. Business also conducts an ETS Major Field Test administered to a BA499 or BA 427 class every three years.

Honors College students demonstrate proficiency in the learning outcomes and therefore the University Studies strands, which map to core themes, by successfully passing proficiency assessments that align with the learning goals.

While these programs are considered exemplars, in all academic programs, the chair or program coordinator (or appropriate designee) evaluates each student's progress through the major to ensure students meet objectives which, as noted above, are mapped to core themes and outcomes at the program level and across the Institution. This process is generally initiated when the student declares a major and begins to follow a degree or advising plan. In addition, assessment of fulfillment of University Studies outcomes is performed by faculty in the individual courses that fulfill general education strand requirements; the major advisor; and Enrollment Services and Academic Advising professional staff as the student progresses and upon degree application.

Standard 4.A.4 **The institution evaluates holistically the alignment, correlation, and integration of programs and services with respect to accomplishment of core theme objectives.**

Each of the University's core theme objectives is linked to institutional priorities that map to SOU's mission. Evaluation of the alignment, correlation, and integration of core themes proceeds from a broad institutional statement to an institutional assessment committee (comprising teaching faculty, administrators, staff, and students) to faculty curriculum and assessment committees and finally to the assessment of student work within individual courses. This enables ongoing and interactive processes by which evaluation of the University's core theme objectives occurs.

The University Assessment Committee undertakes and provides guidance for much of the institutional assessment at SOU. Through the work of the UAC and the concomitant oversight of general education provided by the University Studies Committee, the foundational goals (Strands A–D) are assessed at an institutional level.

For the last three years, the UAC has collected senior writing data and evaluated it against an institutional rubric (see Exhibit X), which provides a comprehensive overview of writing and critical thinking skills across the curriculum. Oral communication and information literacy are similarly assessed, and the Institution is moving toward broad adoption of a quantitative reasoning assessment as well. In the coming years, we will also be piloting tools to assess civic

engagement and the knowledge, skills, and dispositions associated with it as well as cultural diversity as part of a pilot administered by ETS.

In addition, programs engage in review of their program curriculum against core theme objectives during regular assessment work, annual curriculum review processes, and annual and semiannual retreats. For example, during its September annual retreat, the Mathematics Program considers the assessment measures it uses and adjusts the curriculum accordingly. Individual professors adjust their course content in the 300- and 400-level courses, while curriculum changes for lower division classes are facilitated by faculty course coordinators and brought to the program for a vote before moving forward to the University Curriculum Committee and then to Faculty Senate for final approval. Many programs follow a similar cycle of annual or ongoing review and reassessment. The Outdoor Adventure Leadership Program maintains a curriculum committee that meets each term as needed to assess curriculum, as do several others, including the Gender, Sexuality, & Women's Studies Program. Over the past several years, curriculum revisions in programs—including both Psychology and Environmental Science & Policy—were built around core themes and involved the participation of all faculty members in the program and guidance from the University's director of institutional assessment. Teaching faculty in all programs address the core theme learning outcomes with appropriate course assignments and, increasingly, with embedded assessments that track progress toward achievement of these outcomes.

Standard 4.A.5 **The institution evaluates holistically the alignment, correlation, and integration of planning, resources, capacity, practices, and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.**

A campuswide commitment to planning and assessment within both academic and support programs has become entrenched at SOU since the implementation of TracDat, which allows program-level outcomes, their means of assessment, and the results of those assessments to be documented and monitored. Over the last four years, both academic and nonacademic support programs have been focusing the planning of their outcomes around the core themes associated with our mission. Theme mapping reports can be generated to show exactly how program outcomes map to the defined themes (see Table Core Theme Mapping below in 4.B.1). The core theme mapping has been extended to academic support programs, enabling them to relate their programmatic activities and assessments directly to the academic themes and simultaneously orienting them more specifically to student service and support functions. This addresses the need for administrative departments to align outcomes with themes geared toward their nonacademic programming and activities while also integrating and responding to the University's core themes and mission. As noted above, our next goal will be to achieve the same degree of compliance among our 10 graduate programs, several of which are already using TracDat for assessment as well as to maintain external accreditation requirements.

TracDat also permits entry of "actions" or "followups" that program coordinators or assessment personnel identify to enable ongoing and consistent planning; integration of outcomes and priorities; and holistic programming. This feature includes outcomes, means of assessments, results, and actions/followups; provides a structure for programmatic feedback into each subsequent year's planning process; and allows individual program goals to roll up into a broader institutional overview of planning and oversight.

Faculty, staff administrators, and students are integral to these planning activities, particularly when they occur as part of committee functions that operate at the University level. Given the size of the Institution and some of its academic and academic support programs, however, personnel is frequently limited, and thus participation in these processes can at times only involve several individuals (often a program coordinator, chair, or staff member designated to manage assessment). To offset this dynamic, each term the UAC schedules retreats, during which all academic program coordinators as well as many program chairs and faculty share their strategies, artifacts (e.g., rubrics and curriculum maps), plans, and overall progress in the realm of assessment. Further, the UAC, Curriculum Committee, University Studies Committee, Faculty Senate, leadership, and administrative teams in academic support programs maintain a regular meeting schedule along with retreats for planning and assessment.

Standard 4.A.6 **The institution regularly reviews its assessment processes to ensure they appraise authentic achievements and yield meaningful results that lead to improvement.**

Review of assessment procedures occurs in several entities, which engage different levels of the Institution. At the program level, faculty in a program decide outcomes, measures, and means of assessment. They then apply these to student work produced in their classes, but they also measure outcomes according to the Institution's core themes and mission. Forming the foundation of the decision-making process in academic programs, these assessment activities inform discussions and adjustments programs make to curriculum as well as to the majors, concentrations, and degree plans.

Academic programs are in constant communication with SOU's director of university assessment and the UAC about their assessment endeavors. The latter comprises membership from each academic division, staff, and administration. The committee oversees and provides guidance to the academic (and academic support) programs around specific details like individual assessment measures and rubrics as well as more broadly derived institutional initiatives such as the Senior Writing Assessments, Oral Communication pilot initiative, and initial steps toward infusing awareness and assessment of quantitative literacy into the curriculum. Constantly reconsidering and reexamining its priorities, the UAC has developed the capacity to adapt and revise procedures and refine tools and resources shared with programs. This keeps the work of the committee current and helps emphasize the University's assessment goals throughout the Institution. In AY 2015–16, for example, the University Assessment Committee developed a rubric for Oral Communication, pre-tested and applied the rubric to student work in each academic division, and then assessed whether it was effectively capturing

the breadth of oral communication activities and proficiencies across campus. For AY 2016–17, the UAC will build additional metrics into the assessment of oral communication that may address visual literacy as well as further refining its data-gathering around critical thinking and quantitative reasoning. As noted above, the decision to discontinue administration of the Collegiate Learning Assessment following the 2015–16 testing cycle was based on the committee's analysis of the CLA instrument against institutional goals along with current and future assessment activities.

# STANDARD 4.B IMPROVEMENT

Standard 4.B.1 **Results of core theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally identified indicators of achievement; b) used for improvement by informing planning, decision making, and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.**

*a. based on meaningful institutionally identified indicators of achievement*

Institutionally defined indicators reflect the University's mission as expressed in our core themes. Southern Oregon University has been diligent about ensuring assessment of core themes in academic program delivery, services, and operations as well as in requiring that each program identify the extent to which each specific program theme and outcome relates to the University's mission and core themes. The annual assessment reports express the relationship between the core themes, indicators, and SOU's mission. Integration of academic and nonacademic programs ensures our indicators are meaningful to the entirety of the Institution and all aspects of the University's programs and services engage the core themes.

With respect to academic programs, institution-wide assessment efforts that address the goals identified in our last comprehensive accreditation report focus on foundational goals that traverse the University Studies curriculum as well as requirements for individual majors and minors. The skills, dispositions, and knowledge sets associated with the foundational goals are articulated throughout the curriculum and our students' careers. The table below delineates the mapping of program outcomes to each of the University's academic core themes and shows both the total number of outcomes related to a theme as well as the number of programs that map at least one of their outcomes to a given theme.

Across all academic programs, more than 1,600 outcomes are now defined within the TracDat assessment software.

| Academic Core Themes | Outcomes Mapped | Programs Represented |
|---|---|---|
| Core Theme 1: Student Success | | |
| CT 1.1/Strand A – Communicate effectively using Standard American English in written and oral communication. | 188 | 45 |
| CT 1.2 – Collaborate with others to achieve a common goal. | 134 | 41 |
| CT 1.3/Strand B – Use critical and creative thinking to solve abstract and applied problems. | 218 | 46 |
| CT 1.4/Strand C – Access and use information resources effectively and ethically (information literacy). | 132 | 47 |
| Strand D – Demonstrate the knowledge required to effectively formulate and use mathematical models and procedures to address abstract and applied problems. | 20 | 9 |
| Core Theme 2: Intellectual Growth | | |
| CT 2.1/Strands E, F, G – Extend knowledge of human cultures and the physical and natural world through the study of the arts, humanities, social sciences, and sciences. | 113 | 39 |
| CT 2.2/Strand H – Integrate and apply advanced knowledge and skills in one (or more) specialized area(s) of study. | 181 | 41 |
| Core Theme 3: Responsible Citizenship | | |

| CT 3.1/Strand I – Apply knowledge, skills, and ethical inquiry to practical problems locally and globally. | 194 | 43 |
| CT 3.2/Strand J – Understand and respond responsibly to worldviews and cultural practices different from one's own. | 148 | 40 |

[Exhibit 4.B.1 Acad Program Outcomes and Themes]

As we have noted, academic support programs within the Institution now also use the assessment software to define their outcomes. More than 2,000 outcomes are defined by these 76 programs. It should be pointed out that support programs have two sets of themes available to map to outcomes. The first are more specific to general responsibilities typically associated with administrative departments, such as providing customer service and efficiently managing the departmental operations. This set also includes more student-centered themes, such as engaging students, improving retention, and promoting student outreach. The second set of themes available to support programs is the same to which academic programs adhere. These themes were included to recognize that many support programs—such as those within Student Life, Student Support & Intervention, and University Housing—have outcomes that directly relate to specific general education academic theme strands. The data below show mappings for both sets of themes these support programs use.

| Support Program Themes | Outcomes Mapped | Programs Represented |
|---|---|---|
| Advocate exceptional customer service | 236 | 57 |
| Comply with external regulations | 142 | 44 |
| Efficiently manage program | 259 | 56 |
| Engage students | 249 | 59 |
| Foster inclusive community | 174 | 49 |
| Promote health, safety, & security | 145 | 43 |
| Promote widespread student outreach | 149 | 49 |

| Support Program Themes | Outcomes Mapped | Programs Represented |
|---|---|---|
| Academic Program Themes Used by Support Programs | | |
| CT1.1/Strand A: Student Success – Communicate effectively | 97 | 34 |
| CT 1.2/Student Success – Collaborate with others | 152 | 44 |
| CT 1.3/Strand B: Student Success – Use critical and creative thinking | 68 | 30 |
| CT 1.4/Strand C: Student Success – Access and use information resources effectively and ethically (information literacy) | 67 | 29 |
| Strand D – Formulate and use mathematical models and procedures | 12 | 9 |
| CT 2.1/Strand E, F, G: Intellectual Growth – Extend knowledge of human cultures and the physical and natural world | 54 | 23 |
| CT 2.2/Strand H: Intellectual Growth – Integrate and apply advanced knowledge and skills in one (or more) specialized area(s) of study | 52 | 26 |
| CT 3.1/Strand I: Responsible Citizenship – Apply knowledge, skills, and ethical inquiry | 95 | 32 |
| CT 3.2/Strand J: Responsible Citizenship – Understand and respond responsibly to worldviews and cultural practices different from one's own | 89 | 34 |

*b. Results of core theme assessments and results of assessments of programs and services are:
used for improvement by informing planning, decision making, and allocation of resources
and capacity*

As demonstrated throughout our reporting on Standard Four and in sections 3.A.1, 3.A.3, and
3.A.4, planning processes and structures at SOU are undertaken with significant input from
results of core theme assessments. This has been imperative over the last several years in the
absence of a strategic plan and during a time in which metrics and measures of our success
have been required by several internal and external constituencies (e.g., the former State
Board of Higher Education, new Board of Trustees, Higher Education Coordinating
Commission, and interim president). Core theme assessments undertaken during regular
assessment activities have been used as key data points for decisions concerning faculty hiring,
building and space allocation, programmatic expansion or reduction (particularly during
retrenchment), and decisions regarding capital projects and facilities use. All faculty hiring
conducted during the last several years has been determined by close examination of the
efficacy of the program seeking to add or replace a faculty line, its ability to position itself
within the University's broad goals and mission, and its service to our students. It is no longer
the convention, for example, to simply replace a faculty line upon the departure or retirement
of a faculty member. Rather, the Provost's Office, working closely with the division director and
the program itself, bring in assessment data (including faculty loading and other resource
management measures) to make each hiring decision a strategic and inclusive one. The
integration of Academic Affairs and Student Affairs into a single division has also enabled
better consideration of core theme and mission alignment across the Institution, as the
provost's oversight of both areas ensures that curricular and cocurricular and support
functions tie together.

Similarly, the campuswide process that determined the allocation of $582,000 of state-
provided student success funding occurred with input from the University's Planning Board,
assessment data, and the ability of each proposing group or individual to address the extent to
which student success (Core Theme 1) would be met by the proposed program. While
planning in this way can frequently require considerable time and input from a variety of
sources, the benefit is that the institutional planning process flows logically from objectives and
means of measurement to evidence that demonstrate outcomes. Each of the funded proposals
demonstrated ability to advance the core theme of student success and identified approaches
to assess and measure outcomes. Focused assessment of these initiatives will commence in fall
2016.

Larger-scale decisions such as seeking or allocating funds for capital improvements and other
infrastructure decisions are made in consultation with a wide range of campus groups and
constituencies. Among these are the Board of Trustees, Executive Cabinet, Provost's Advisory
Council, Finance & Administration's Business Affairs Council, Directors Council, Faculty and
Student Senates, University Planning Board, Student Affairs Council, Enrollment Council,

Technology Council, and Student Success Committee. All of these groups review or advise on an array of plans, initiatives, and general operational decisions.

As noted previously, conditions have been attached to the continuation of an independent board of trustees at SOU. These conditions require in part that the HECC receive regular and thorough reports from SOU on all aspects of the Institution, with particular focus on financial data, enrollment data, and mission definition. These groups assess and determine funding, capacity needs, and priorities with specific attention to the mission and core themes.

*c. made available to appropriate constituencies in a timely manner*

Results of core theme, program, and service assessments are disseminated in various ways to appropriate campus constituencies and others (e.g., external accreditors, members of program advisory councils, supervisors and senior administration, and SOU's Board of Trustees). The University Assessment Committee convenes quarterly campuswide assessment retreats, during which it shares training, assessment results, and institutional priorities with appropriate program personnel from both academic and academic support programs. In addition, the UAC assesses each program's reports annually and communicates the results of these evaluations to program personnel and the administration members to whom each program chair or supervisor reports. In this way, a constant cycle of reporting, assessment, and intentional improvement is maintained, along with continued reinforcement of the importance of assessment, adaptation, and improvement. The UAC also provides regular reports to broader campus entities, including Faculty Senate and the University Planning Board, on which the associate provost serves as the University's accreditation liaison officer (ALO). Since SOU's Board of Trustees assumed responsibility in 2015, it has received regular reports on accreditation and assessment, including updates on the preparation of the Year Seven Report and other campus assessment activities.

Individual programs and divisions are also actively involved in the dissemination of results and priorities related to assessment, as demonstrated by the high percentage of programs that devote their annual or semiannual program retreats to aligning their individual needs and planning processes with the feedback provided by UAC and the director of institutional assessment. Results of assessment activities such as the CLA, Senior Writing Report, and NSSE are also distributed via Faculty Senate and are shared with other committees and personnel as appropriate.

Standard 4.B.2 **The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.**

As noted above, the UAC and other individuals and entities working closely on assessment activities maintain constant contact with the academic and academic support programs to facilitate improvement and understanding of institutional responses to results obtained from

assessment work. In 2016, for example, CLA results were received and analyzed in the space of several weeks, leading to the determination to discontinue administration of the assessment. As noted above, the instrument no longer measures students' critical thinking skills in a way that is consistent with our definition of critical thinking and the tasks that articulate it. In addition, internal processes (including assessment of senior writing and oral communication) assess these skills and Core Theme 1 (Student Success) much more effectively than the CLA. Our recent engagement with the Multi-State Collaborative advances our institutional goals—in particular, the core theme of student success—and allows us to benchmark SOU against other institutions in the way we had originally intended for the CLA to do. Due to the large number of transfer students who matriculate to SOU, comprehensive results are only available for a small subsample of our students, which compromises the reliability of the data and disallows comparison with national data. Finally, our students' self-reports of effort on the CLA suggest the assessment does not resonate significantly with their own understanding of their academic and personal learning, while their senior writing results and broad participation in events like SOAR suggest we create effective opportunities internally and our students are aware of and engaged in them. The resolution to discontinue CLA exemplifies the result of multipronged engagement with assessment and the inclusive and timely nature of the discussions that guide our decision making about assessment.

Another effort to apply results to institutional improvement is the decision to eliminate collaboration as a core theme while maintaining and reintegrating it into programmatic planning as an instructional strategy that connects to other outcomes. Collaboration is not one of the stated goals of our University Studies Program and consequently does not map as tightly to our institutional mission and core themes.

The core theme of intellectual growth (CT 2) is foundational at SOU in the majors, minors, and University Studies (Strands E, F, G, and H). By engaging the faculty in programmatic assessment, we put student learning at the core of curricular and institutional decision making. Program personnel engage in defining specific assessments that measure learning outcomes; collect student data; analyze the results; make improvements based on data; and disseminate the results to the larger SOU community through TracDat and workshops.

As of now, we can demonstrate progress toward assessment of responsible citizenship (CT 3), which reflects the institutional decision to focus on this theme (from global to global *and* local) and the significant number of students who gain practical experiences (e.g., capstone, practicum, service learning) and connect to the local community. We are not capturing the totality of the learning experience, however, particularly as it relates to Core Theme 3.1, by identifying appropriate learning and discipline-specific learning outcomes. While we generate abundant data detailing the extent to which students are exposed to field projects and other applied settings, along with the number of hours spent in them, we do not have a method such as a rubric or artifact to assess the quality of the collaborative activities, nor do students connect these activities to learning outcomes. SOU was recently invited to be part of a pilot conducted by Educational Testing Service (ETS) featuring a tool assessing civic competency

and engagement. Participation in this pilot and future work will add depth to our understanding of students' responsible citizenship (CT 3).

# Standard Five

*Mission Fulfillment, Adaptation, & Sustainability*

## EXECUTIVE SUMMARY OF ELIGIBILITY REQUIREMENT 24

Eligibility Requirement 24: Scale and Sustainability

**The institution demonstrates that its operational scale (e.g., enrollment, human and financial resources, and institutional infrastructure) is sufficient to fulfill its mission and achieve its core themes in the present and will be sufficient to do so in the foreseeable future.**

The University regularly examines its ability to fulfill its mission by employing comprehensive and inclusive planning and assessment processes that are data-driven and strategic. While the Institution has not engaged in a formal strategic planning process since the previous plan expired, strong adherence to data-driven and informed decision making has become the expectation and the norm at SOU. This has recently become even more significant due to the information needs coming from our newly seated Board of Trustees; the conditions to maintain an independent board defined by the previous state board and new Higher Education Coordinating Commission (HECC); and the institutional retrenchment plan. These processes provide abundant evidence that the University is positioned to continue to fulfill its mission and has engaged in sufficient analysis and planning around fiscal health and infrastructural capacity to strategize accordingly. Regular assessment of academic programs; nonacademic support services and functions; faculty; and other resources provides the additional information required to understand our current needs and situation and to progress with a continued focus on meeting our goals of increasing retention and degree completion; supporting students for success at the University and beyond; and strengthening existing partnerships in the region and state while simultaneously forging new ones.

## 5.A MISSION FULFILLMENT

5.A.1 **The institution engages in regular, systematic, participatory, self-reflective, and evidence-based assessment of its accomplishments.**

Since 2009, when Southern Oregon University's last strategic plan was implemented, the Institution has undergone a period of significant transition and some additional strains. These factors have both necessitated careful assessment and analysis of all aspects of the University and reinforced our commitment to assessment. Several years of enrollment decline and funding challenges have increased SOU's reliance on tuition dollars as its primary source of

revenue. Coupled with escalating personnel costs and additional financial stressors related to Oregon University System procedures, the University's fund balance dipped below the 5% minimum required by Oregon's State Board of Higher Education in 2013, and the Institution declared retrenchment in 2014 for the second time in seven years. While the previous retrenchment of 2007 left most academic programs intact, Southern Oregon University was already "thin" administratively (as was noted by evaluators in SOU's Year Three report to NWCCU), and oversight and management of academic programs were neither optimal nor equitably distributed since the majority of SOU's academic programs resided under one large college without the proportionate staff and management to administer it. Between 2011 and 2014, several significant planning and assessment activities were undertaken to gather information and provide analysis to help determine appropriate steps and institutional processes to address these challenges. In most cases, these were carried out with the broad participation and input of the campus community; transparency of reporting results; and application of findings. These include:

- a 2012 Capacity Study based on data collected on all aspects of University operations and focused on enrollment, human resources, and facilities;

- a 2013 campuswide Program Prioritization Process, during which each program that either consumed or produced resources conducted a comprehensive self-review, culminating in programs being ranked into quintiles—the first quintile was designated for programs meriting additional investment, and the fifth was for those that no longer served the Institution in a sustainable or efficacious way;

- the 2012–13 integration of Academic & Student Affairs, guided by a transition team comprising administrators, faculty, staff, and students who collectively developed outcomes and determined best steps to achieve this reorganization and maintain quality while reducing expenses;

- the 2013 Workforce Productivity Study, which quantified course release time (previously, documentation and actual amount of release had been poorly and inconsistently managed); using the Faculty Constitution and Bylaws definitions that regulated faculty teaching loads (ELU's), it was possible to analyze course history data and arrive at the difference between expected loading vs. actual loading for each faculty/program; and

- the 2014–17 retrenchment plan.

In 2015, SOU gained its own institutional board, subject to conditions first articulated by the Oregon University System and then passed on to the state's Higher Education Coordinating Commission (HECC). Assessment of Southern Oregon University's accomplishments and performance measures ensures that SOU achieves the metrics required by the Oregon University System to retain an independent board of trustees. Along with the three-year retrenchment plan implemented in 2014, which largely serves as the University's strategic plan,

assessment of key benchmarks and performance indicators has become part of the institutional culture.

SOU has fully committed to undertaking a variety of assessments that help determine the quality and effectiveness of its programs and mission fulfillment as well as to enhancing the Institution's, efficacy, sustainability, and effective management. Along with organizational changes in the Provost's Office, university-wide assessments and program-specific processes are in place. Both are conducted with a broader view of Southern Oregon University's future and accountability to its internal constituents, including students, faculty, staff, and its newly seated Board of Trustees. These include:

- creation of the new associate vice president for academic resource management position, whose charge includes assessing faculty productivity and aligning curricular offerings with institutional and programmatic capacity;
- the academic reorganization, which created a relatively equitable distribution of faculty FTE across the seven academic units; eliminated deans and instituted the position of director; and enabled a flatter and more collaborative process across academic units;
- implementation of the annual faculty loading report (under the auspices of the AVP for academic resource management), which quantifies faculty instructional and noninstructional loading, ensures equity of workload across academic programs and divisions, and informs planning for best use of faculty resources to meet student and other institutional needs;
- annual assessment reporting that details each academic and academic support program's efforts to align programmatic objectives with the University's mission—as of 2014–15, each academic program now submits an annual assessment report based on our core themes and receives an evaluation, feedback, and support to follow up on actions and improvements required; and
- detailed and frequent monitoring of enrollment, retention, and other metrics that measure the successful implementation of our retrenchment plan.

It is anticipated that our commitment to assessment with regards to enrollment, quality of programs, operational efficiency, and mission fulfillment will bring SOU to successful completion of retrenchment in 2017. Under the direction of a new president, the next phase of strategic planning will generate its own set of measurements, which the campus will use during the strategic planning period and which will define the next cycle and outcomes.

5.A.2 **Based on its definition of mission fulfillment, the institution uses assessment results to make determinations of quality, effectiveness, and mission fulfillment and communicates its conclusions to appropriate constituencies and the public.**

Since our last full 10-year accreditation review in 2007, significant activity has taken place with respect to assessment activities, utilization of results, and dissemination to campus and public.

Among the most notable changes are the establishment of an Institutional Research (IR) office, the appointment of a director of university assessment, and the implementation of TracDat, a software program used to assign and track assessment and planning outcomes. TracDat was implemented by academic programs first in 2012, then by nonacademic support programs in 2014. Now used by all academic and academic support programs on campus, TracDat provides the opportunity to standardize program assessments, their results, and program plans going forward.

Every program on campus now submits annual assessment reports, and the directors of assessment and institutional research collaborate with the Provost's Office, accreditation liaison officer (ALO), and University Assessment Committee to hold quarterly retreats for all programs focused on training; sharing of results and best practices related to assessment; and discussion of institutional priorities.

In addition to the campuswide participation in assessment activities, determinations of quality, effectiveness, and their relationship to core themes and mission are disseminated throughout campus and to other constituencies via a variety of venues. The SOU Board of Trustees (including three committees: Executive & Audit, Academic & Student Affairs, and Finance) provides oversight for institutional management and receives input from the president and President's Cabinet as well as other planning and leadership entities such as the University Planning Board, Faculty Senate, Associated Students of Southern Oregon University, and the Directors and Provosts Councils. In its first year, the SOU Board of Trustees has received regular reports on assessment and accreditation from the ALO and director of university assessment. Information regarding assessment and improvement is disseminated widely by:

- programmatic reporting in TracDat and participation in assessment retreats and other assessment activities;
- annual assessment reporting and evaluation of programs' reports by the assessment review committees, the results of which are shared with program chairs/coordinators and others responsible for assessment;
- the University Assessment Committee and University Curriculum Committee collaborating to achieve common goals and understandings of SOU's mission and to ensure consistency of tasks and reporting to academic programs and Faculty Senate;
- the provision of data and reports that respond to the specific metrics required by the HECC evaluation framework;
- retrenchment reporting on enrollment, retention, resource management, and other areas to internal and external constituencies;
- membership of the ALO on the University Planning Board to represent University assessment while the board also receives input from a wide range of University entities on planning activities;

- representation from several SOU administrative entities on the Academic Support Programs Assessment Review Committee, including Finance & Administration, Student Life, Enrollment Services, Institutional Research, University Library, and Facilities Management & Planning;
- several academic programs having external advisory councils to whom they routinely report, including SOU Honors College and Environmental Science & Policy;
- SOU's Board of Trustees adhering to Oregon open meeting rules, meaning that all meetings and associated materials are open and available for public attendance and comment; and
- academic programs (including Chemistry, Clinical Mental Health Counseling, Music, Education, Environmental Education, and Business Administration) reporting to external accreditors.

# 5.B ADAPTATION AND SUSTAINABILITY

5.B.1 **Within the context of its mission and characteristics, the institution evaluates regularly the adequacy of its resources, capacity, and effectiveness of operations to document its ongoing potential to fulfill its mission, accomplish its core theme objectives, and achieve the goals or intended outcomes of its programs and services, wherever offered and however delivered.**

Institutional monitoring of resources, capacity, and operational effectiveness is critical for SOU to continue to achieve the gains made since retrenchment was declared in 2014 and to respond to the conditions under which the HECC evaluates us. More importantly, the University continues to emphasize student success and mission fulfillment as the primary goals and key aspects that inform all assessments within the programs.

The Board of Trustees, as noted above, has become acculturated to receiving assessment-informed reports from all sectors of campus, ranging from the provost's and president's regular reports to updates from representatives of Student Life, Admissions, Student Support & Intervention, academic divisions, Student Health & Wellness, Institutional Research, and Faculty and Student Senates. These reports include frequent updates on enrollment; retention and admissions activities; and student life, academic activities, and operations.

Ongoing monitoring of the retrenchment metrics and our continued ability to demonstrate successful implementation of the retrenchment plan helps inform decision making at both the program and institutional levels. Furthermore, this monitoring is itself informed by specific data gathered from individual programs as well as larger institutional performance indicators. Data generated from faculty loading reports, for example, enable the Provost's Office to determine the areas in which reinvestment into academic programs should occur. These decisions, in

turn, help articulate the priorities and will influence the eventual strategic development of programs once the Institution moves out of retrenchment.

While we are making good use of the feedback and data gathered to monitor and assess progress through resource planning, we continue to experience uncertainties and the limitations of not having a formal strategic plan. This does not, however, prevent us from focusing on investing in programs designed to support sustained enrollment growth and retention. In 2014–15, legislative funding allowed for investment in strategic initiatives around enrollment and retention, 40-40-20 goals, and other state-level priorities. SOU earmarked these funds for Student Success Initiatives, announced a campuswide call for proposals, and funded roughly 12 initiatives designed to enhance student success. Projects were assessed and approved through an extensive data-driven and transparent review process. In 2016, the Student Success Committee will work with the director of institutional assessment to analyze these initiatives with a view to mission fulfillment and core themes as well as institutional efficacy. As we transition out of retrenchment and welcome a new president, we expect to reengage in strategic planning with the benefit of the assessment data from these initiatives.

With respect to institutional assessment, the University Assessment Committee has coordinated with the director of institutional assessment, Provost's Office, and Institutional Research to bolster the culture of evidence and assessment we reference elsewhere in this report via systematic and routinized assessment activities over the past several years, including:

- annual reports, ongoing training, and retreats designed to support and use assessment;
- revisions to and adoption of institution-wide rubrics to measure indicators and achieve objectives; and
- integration of academic support programs into assessment.

Every educational program at Southern Oregon University has articulated student knowledge, skill, and disposition outcomes for their graduates. University Seminar (USEM), our yearlong first-year seminar, has provided the Institution with the most evidence that assessment of student achievement leads to the improvement of teaching and learning. Over the years, the USEM Program has collected diagnostic data that have been used by its faculty to modify the curriculum. University Seminar faculty members designed a diagnostic essay assessment tool to be embedded in all sections of USEM at the beginning and end of the year. Data from the diagnostic essays are used to monitor individual student achievement. Also included is a pre-assessment to use in the design and implementation of each USEM section.

Achievement data from these diagnostic essays are also used to guide the professional development of USEM faculty and monitor student achievement longitudinally. In addition, these embedded assessments provide institutional baseline data in the following areas: (1) use of standard English, (2) writing organization, and (3) the construction of logical arguments (a type of critical thinking used across all disciplines). Similar efforts are underway for the

University senior capstones and the assessments of oral communication and quantitative reasoning.

Southern Oregon University is a partner in the Multi-State Collaborative, which gathers and assesses student work products from institutions across the United States to provide meaningful evidence about how well students are achieving important learning outcomes. SOU has also recently signed a contract to join a pilot study of civic engagement and cultural competence assessment administered by Educational Testing Service (ETS). Funded as a Student Success Initiative, the first yearlong Curriculum Design Academy addressing first-year "gateway" course curricula to reduce the incidences of student failure and withdrawals concluded in 2016. We will repeat this initiative during the 2016–17 academic year.

Continuous monitoring and improvement are hallmarks of the work we have done to meet expectations around retrenchment, HECC conditions, and the value of an SOU degree.

### 5.B.2 **The institution documents and evaluates regularly its cycle of planning, practices, resource allocation, application of institutional capacity, and assessment of results to ensure their adequacy, alignment, and effectiveness. It uses the results of its evaluation to make changes, as necessary, for improvement.**

As noted above, we have undertaken comprehensive planning over the past five years and have become adept at developing benchmarks and goals. This has occurred with the oversight of external entities such as the OUS, OSBHE (prior to 2015), and HECC, especially as it relates to the monitoring of our retrenchment plan. Internally, this has transpired within the context of the University Planning Board (UPB), University Assessment Committee (UAC), Division of University Studies, and newly instituted budgeting processes. Both internal and external entities have served as constant sources for evaluating our planning efforts and adjusting them as necessary. Mentioned earlier, a good example is the UAC's decision to discontinue use of the CLA and replace it with an internal pre- and post-writing assessment administered to first-year students.

### 5.B.3 **The institution monitors its internal and external environments to identify current and emerging patterns, trends, and expectations. Through its governance system, it uses those findings to assess its strategic position, define its future direction, and review and revise, as necessary, its mission, core themes, core theme objectives, goals, or intended outcomes of its programs and services and indicators of achievement.**

The recent transition from the Oregon State Board of Higher Education to a local board strengthens SOU's connection to the community and enhances its ability to bring the community's priorities to the University. With input provided by administration, faculty, staff, and students, the board is well-positioned to collaborate with the president and entire SOU community on assessing and expressing strategic goals, future directions, and mission.

Legislators have given HECC the authority to monitor mission integration across the seven Oregon universities, within the appropriate scope according to each institution's accreditation and strategic planning frameworks. The HECC has proposed that each institution adapt its mission to build on specific niches and directions complementary to the other institutions and the state as a whole. SOU's mission will be revisited subject to priorities of a new president as well as additional guidance from the Board of Trustees and HECC.

Strategic goals and mission will also be informed by the ongoing monitoring provided by the retrenchment plan and other data, such as those resulting from assessment of the Student Success Initiatives. In addition, the division structure derived from 2014's academic reorganization has created opportunities for division directors to collaborate closely with one another, enabling interdivisional and intradivisional monitoring and partnerships. Division directors work closely with the Provost's Office to identify patterns and trends in areas like enrollment and curriculum, which promotes stronger and more integrated strategic planning. Similarly, the integration of Academic and Student Affairs has facilitated a steady flow of information internally. This integration also follows national trends and was designed with the findings of other comparator institutions in the United States and regionally in mind. Ongoing prioritization activities continue to influence the positioning of objectives, goals, and indicators within the wider context of institutional goal-setting as well.

With respect to monitoring external environments both locally and regionally, SOU sustains many activities and partnerships that inform decision making, problem solving, new program development, and collaboration. See below for examples.

- Partnerships with other institutions in the region through programs such as Pirates to Raiders and the Jackson/Josephine Pledge increase educational opportunities for prospective students, many of whom are first-generation, of low socioeconomic status, or from marginalized or underrepresented communities for whom access to higher education has historically been limited.

- Program-specific accreditation—including the American Chemical Society (ACS), National Association of Schools of Music (NASM), Council for Accreditation of Counseling & Related Educational Programs (CACREP), Accreditation Council for Business Schools & Programs (ACBSP), and North American Association for Environmental Education (NAAEE)—ensures quality of educational offerings in these programs by national standards and enhances the University's ability to stay abreast of the needs and trends within those disciplines.

- Senior leadership members serve on a wide variety of local and national boards and advisory councils, including the Jackson County Budget Committee, Public University Risk Management Insurance Trust, Southern Oregon Public Television (SOPTV), Southern Oregon Regional Economic Development (SOREDI), Rogue Workforce Partnership Board, Southern Oregon Success (SORS); and ACCESS.

- SOU holds institutional affiliations and membership in professional associations, including the Council of Public Liberal Arts Colleges (COPLAC); the American Association of State Colleges & Universities (AASCU); the Association of American Colleges & Universities (AAC&U); National Association of College & University Business Officers (NACUBO); National Association of College & University Attorneys (NACUA); NASPA, Student Affairs Administrators in Higher Education; and others.

- SOU participates in several national research initiatives and collaboratives in higher education, such as the Educational Advisory Board (EAB); American Association of State Colleges and Universities (AASCU); AASCU's Re-Imagining the First Year of College initiative; College Transition Collaborative; Association of American Colleges & Universities (AAC&U); and Educational Testing Service (ETS).

- Senior administration sit on several statewide councils, including the President's Council, Provost's Council, VPFA Council, Inter-Institutional Faculty Senate, Oregon Graduate Deans Council, the state's Legislative Advisory Council, and Learning Outcomes & Assessment Council.

- SOU administrators and faculty serve on several HECC-sponsored working groups that position the University as an informed and active member of groups that address state-identified issues and concerns in higher education and develop strategies to address them.

- Community outreach and workforce analyses enable local priorities to inform academic programming, including the development of the innovation & leadership and medical & health services degree programs currently underway, the latter being crafted using research support from an SOU Business Administration Capstone class. [Exhibit 5.B.3 Medical and Health Services Degree Program]

- Rogue Valley Community Television (RVTV) is a partnership between Southern Oregon University, Jackson County, and the cities of Ashland, Eagle Point, Medford, and Grants Pass. RVTV serves the public information needs of Southern Oregon by broadcasting a wide array of public meetings and other government content; providing citizens with access to training and resources with which they can produce and broadcast their own programming; and broadcasting other educational and nonprofit content for the benefit of the community.

# Conclusion

Since last submitting a comprehensive report to NWCCU in 2007, Southern Oregon University has achieved considerable gains in areas such as assessment and evaluation of learning outcomes, strategic planning, and infusing the University's mission and core themes into all aspects of the University. We have also made significant advances in establishing SOU as a regional leader for sustainability, one of the nation's most LGBTQ-friendly universities, and one of the New York Times' "hidden gem" universities.

The University has weathered a series of challenges related to organizational and instructional efficiency, changes in leadership, and an increasingly complex student demographic that requires us to be creative, purposeful, and innovative in our efforts to enroll, retain, and support them through to degree completion. In the last three years, the state has passed legislation that altered how universities in Oregon would be governed and funded. SOU has welcomed its own independent governing board while working to absorb many of the services and functions of the former Chancellor's Office and university system. We were affected by the 2015 shooting at Umpqua Community College, which claimed the lives of nine and brought the increasingly pervasive narrative of violence in education to our region, requiring that our support and intervention teams, as well as our campus public safety services, be strengthened to ensure our students' well-being. Throughout these and many other challenges, changes, and opportunities that have characterized SOU's recent history, commitment to the three themes comprising our mission remains imperative.

This report clearly identifies our achievements, measures that define our success, and goals and objectives that will guide our future. It is clear SOU fulfills its mission, particularly to the extent that our students are encouraged (and in many ways, required) to connect a strong commitment to the liberal arts curriculum with real people, communities, and issues. The core theme indicators we have developed operationalize essential elements of the mission and provide us with a solid foundation for tracking performance over time and effecting change where needed. Moreover, the connection between the intellectual and practical extends beyond academic programming. Not only is the University expanding career preparation opportunities that integrate directly with disciplinary and academic programming, but we also see significant evidence of core theme and mission alignment in nonacademic and operational aspects of the Institution. Similarly, planning processes (ranging from the University's retrenchment plan to individual faculty hires) are being made with care: they are supported by data; measured for effects and integration with all aspects of the University's mission and strategic thinking; and assessed with attention to impact on students. Careful planning is also made evident by SOU's success in achieving goals associated with retrenchment. FY 2016's ending fund balance was 11.9%, exceeding the 10.9% target. Close and continuous monitoring of class sizes and faculty loading have meant under-enrolled classes are no longer offered, and faculty reassignments to meet areas of greater student needs benefit both the students and the Institution's desire to align resources and capacity.

We have made substantial gains in the assessment and improvement of student learning outcomes, which assists us with planning, adjusting, and improving the curriculum while educating us about our students and their needs. While we cannot claim to have met all targeted objectives for student achievement and the value-added gains of an SOU education, we have intentionally addressed shortfalls and have implemented strategies to achieve, adapt, or reconsider outcomes when they are not being met. An important next phase will be to work with graduate programs to define and implement assessment plans and activities.

Over the past few years, a number of additional student support systems have been introduced at SOU. These not only further goals associated with student success, but they also yield data. Among these is an in-house designed predictive analytics model that uses a series of indicators to predict and inform early intervention for students at academic risk. New personnel and resources have been added for student mental health counseling and behavioral support, while the first-year Bridge program and Honors College integrate career development, mentoring, and peer support in cohort-based learning communities.

In terms of resources and capacity, recent changes have enhanced the campus both aesthetically and functionally, including the new North Campus Village housing facility, the Student Recreation Center now under construction, a recently renovated Science Building, and The Farm at SOU, where students work alongside community partners and faculty. We have centralized administrative support functions into a Service Center, reducing duplication of effort and streamlining resource use.

Preparing this report has also provided us with additional insight into areas that require serious attention. Retention and completion are priorities. More specifically, we remain committed to improving retention and completion of Oregon resident students, particularly from underserved communities. While SOU has broadened the depth and scope of its regional recruiting (in programs like the Jackson and Josephine Pledge, for example), we continue to struggle to retain students, particularly those for whom socioeconomic status, cultural origin, gender or sexual identity, or veteran status already impose barriers to completion. The state's educational goals and the shift to funding allocation based partially on completion and tied to demographic characteristics demand focused approaches and impactful enrollment, support, and degree completion initiatives. The University needs to engage and retain resident students, minority students, and those holding veteran, active military, or military-connected status. Alongside these efforts, improvement can also be made in recruiting and retaining a more diverse faculty and staff population as well as in providing professional development for all faculty and staff, particularly those from underrepresented demographics. Aligning curricular and faculty resources will continue to challenge the University as many faculty will retire soon and we recruit new faculty.

While we anticipate our fund balance will remain strong, given the success we have had in achieving the goals of our retrenchment, we need to continue to hire and plan strategically and to consider the programmatic and institutional impact of faculty hiring and productivity.

This report demonstrates that planning on this campus takes place with collaboration, transparency, and accountability in mind, but we are also aware these processes do not always mitigate difficult decisions involving reducing human and infrastructural resources when budgets are strained. Even in a period of transitional leadership and in the absence of a strategic plan, planning has become much more data-driven, strategic, and tied to the University's mission. We have leveraged systems and software to document and support assessment and to inform future planning, and we have an effective organizational structure that bolsters our planning efforts.

SOU has built a solid foundation for assessment of mission fulfillment and improvement that includes its governing board, senior administration, faculty, staff, and students. As we move out of retrenchment and continue to work to advance legislative and HECC-defined priorities, we also welcome the leadership of a new president and governing board. The analysis we have compiled for this Year Seven Report will be extremely valuable and will complement the work we have done over the past several years to monitor, measure, and assess our success as an institution.

# Appendix 4.A.1 Four Column Assessment Reports for Academic Programs

- Exhibit 4.A.1 Anthro 4 column assessment report
- Exhibit 4.A.1 Bio 4 Column Assessment Report
- Exhibit 4.A.1 Business 4 column assessment report
- Exhibit 4.A.1 Chemistry 4 column assessment report
- Exhibit 4.A.1 Communication 4 column assessment report
- Exhibit 4.A.1 Computer Science 4 column assessment report
- Exhibit 4.A.1 Creative Arts 4 column assessment report
- Exhibit 4.A.1 Criminal Justice 4 column assessment report
- Exhibit 4.A.1 Early Child Educ 4 column assessment report
- Exhibit 4.A.1 Economics 4 column assessment report
- Exhibit 4.A.1 Elem Ed 4 column assessment report
- Exhibit 4.A.1 English 4 column assessment report
- Exhibit 4.A.1 Env Studies 4 column assessment report
- Exhibit 4.A.1 Green House 4 column assessment report
- Exhibit 4.A.1 GSWS 4 column assessment report
- Exhibit 4.A.1 Health and PE 4 column assessment report
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- Exhibit 4.A.1 Honors 4 column assessment report
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- Exhibit 4.A.1 INL 4 column assessment report
- Exhibit 4.A.1 Intl Studies 4 column assessment report
- Exhibit 4.A.1 Lang and Culture 4 column assessment report
- Exhibit 4.A.1 Library Instr 4 column assessment report
- Exhibit 4.A.1 Management 4 column assessment report
- Exhibit 4.A.1 Math 4 column assessment report
- Exhibit 4.A.1 Military Science 4 column assessment report
- Exhibit 4.A.1 MInd Body House 4 column assessment report
- Exhibit 4.A.1 Music 4 column assessment report
- Exhibit 4.A.1 Native Am Studies 4 column assessment report
- Exhibit 4.A.1 OAL 4 column assessment report
- Exhibit 4.A.1 Physics 4 column assessment report
- Exhibit 4.A.1 Political Science 4 column assessment report
- Exhibit 4.A.1 Psychology 4 column assessment report
- Exhibit 4.A.1 Skeptic House 4 column assessment report
- Exhibit 4.A.1 SOAN 4 column assessment report
- Exhibit 4.A.1 Social Justice House 4 column assessment report
- Exhibit 4.A.1 Sociology 4 column assessment report
- Exhibit 4.A.1 Theatre Arts 4 column assessment report
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**Final Retrenchment Plan**

**Southern Oregon University**

**March 2014**

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# Introduction

After years of state disinvestment, Southern Oregon University (SOU) relies on student tuition for the largest percentage of its revenue. Thus, an unexpected drop in fall enrollment, coupled with two of the largest graduation classes in university history and a significant change in an Oregon University System (OUS) accounting policy, led to university reserves dropping below the 5% minimum required by the State Board of Higher Education.

Serious cost decreases, including furlough days, staffing reductions, and structural changes, as well as fund transfers, were included in a budgeting plan that would assist the university in achieving a 5% fund balance (reserve) by the end of the 2013-15 biennium and a 10% fund balance by the end of the 2015-17 biennium. Nonetheless, it became clear that, in order to achieve financial goals, reductions in faculty were also needed.

The need to reduce faculty led to the official declaration of retrenchment: *Retrenchment* is a technical term in Article 11 of the Collective Bargaining Agreement between SOU and the Associated Professors of SOU (APSOU). The term refers to the "declaration of a need requiring reduction and/or elimination of a program or faculty positions after fulfilling the requirements of OAR 580-021-0315 'Termination Not for Cause' and this article."

This document is the finalized University Retrenchment Plan. Resulting from the work of many individuals, the plan reflects priorities established in 2008 through SOU's strategic plan. It also reflects the strategic thinking that informed SOU's prioritization process in 2012-2013. In recent weeks, the plan has been considered and molded by thoughtful ideas and suggestions from students, staff, faculty, University Planning Board (UPB), Chancellor's office staff, and State Board of Higher Education members as well as members of our external communities.

The plan particularly reflects input received during the comment periods that preceded and followed publication of the provisional plan in February 2014. We received feedback from APSOU and the Faculty Senate. SOU faculty, staff, students, external community members, State Board of Higher Education members, and the Chancellor's Office staff provided recommendations and suggestions. We held open forums, met with groups of faculty, held Q & A sessions with the Student Senate and other student groups, and spoke with community members such as the SOU Foundation Board and the President's Advisory Board.

Substantive input was received also from UPB after board members met with individual academic program representatives. In these meetings, program heads and department chairs presented analyses of staffing needs and possible curricular changes, reviewed known and possible retirements and sabbaticals, and explored areas in which their respective programs were critical to the curriculum of other programs. Program heads also examined areas in which faculty can and do teach in more than one discipline or program.

A major change to the plan occurred during the visit of the Interim Chancellor and Chancellor's Office staff on March 5 and 6. The APSOU Board agreed to a proposal that would remove a "very worst case" scenario that had been required by the Chancellor's Office in the provisional retrenchment plan. That scenario would have required reducing costs by an additional $2 million

in academic areas. In the agreement between APSOU and the university, the "very worst case" is removed from this final plan, but a fast-track process would be put in place in fall 2014 or fall 2015 if financial benchmarks are not achieved. (For the entire Memorandum of Agreement, please see the additional documents listed on the stateoftheuniversity website.)

Particular thanks are due to the Institutional Research Office and budget staff in several offices who have worked hard to gather data, run complex financial projections, and ensure the accuracy of financial analyses in this final plan.

## Overall Retrenchment Outcomes

This final retrenchment plan lays out a process to achieve our overall goal of financial sustainability: a 5% fund balance by the end of the 2013-15 biennium and a 10% fund balance by the end of the 2015-17 biennium. The plan calls for $6.1 million in permanent savings and $7.8 million in one-time savings. Implementation of the plan eventually reduces permanent faculty lines by 12.58 FTE (not counting retirements) with the goal of increasing the overall student/faculty ratio from 17:1 to 21:1.

## Responses to Comments

Comments from all sources were considered in the creation of this final plan. The most significant change from the Provisional Plan is the elimination of the "very worst case" scenario. The implications of that scenario were disturbing to many constituents; thus, the agreement with APSOU described in the Introduction to this plan is very welcome. Eliminating the very worst case addresses many of the concerns that came forward in the comment periods.

A number of comments from APSOU members and also from the Chancellor's Office stressed the importance of including the reductions and re-structuring work that has taken place outside of Academic Affairs. Sections on strategic planning and enrollment planning were also included as a result of comments received.

It was not possible to meet financial goals and retain all the programs that received supportive comments. However, this final plan retains the International Studies major and minor, and the Art BFA in light of input that stressed the very minimal cost of the program. Although the Physics major and options will be eliminated, as indicated in the Provisional Plan, comments from current and emeritus faculty as well as business leaders will form the foundation for a serious review and re-thinking of that program for the future in light of students' and employers' needs.

A number of very useful comments were received from UPB and from program faculty, particularly regarding programs that will not be eliminated but will be streamlined or restructured. Many of those comments and ideas will be incorporated into division plans as they are prepared this spring.

Below is a summary of the 239 unduplicated comments SOU received in writing during the 20-university day comment period following distribution of the February 6th Provisional Plan. Other comments were received in meetings and individual conversations.

## Comments in Response to the Provisional Retrenchment Plan
(Summarized on March 8th, 2014)

Contributors sent comments to a variety of email addresses and sites. The State of the University "declarecomments" email address received 156 comments during the period. The President and Provost received 83 unduplicated emails and letters. (Many comments were sent to both the President and the Provost via email and letter.)

**Physics Major**
The largest number of total comments (70) pertained to the proposed elimination of the Physics major. We heard from scientists, doctoral candidates, and instructors from as close as Rogue Community College and the University of Oregon and as far away as New Zealand. (Many of the messages used the same form letter.) Local business owners and professionals wrote to us about the importance of STEM programs to the University community and to employers in the Rogue Valley and beyond. Several SOU alumni (all gainfully employed) expressed their support for the Physics program.

*"I consider the physics department at SOU to be the jewel of the Siskiyous. SOU has become the hard science oasis in the technological desert between San Francisco and the Willamette Valley."*

*"With the SOU physics program, I was able to study both theoretical and experimental physics at a school uniquely situated in a crossroads of literary, artistic, and scientific creativity – as well as being located in one of the most beautiful places on earth. The small class sizes and personal teaching I found in the SOU physics program were essential to my academic growth, and the unique opportunities to do research in a stimulating environment - with professors that both helped guide my work and that encouraged me to pursue independent, novel projects – were vital to me."*

*"While I understand that without sufficient financial support the University cannot function, reducing the physics department to such an extent harms the quality of all STEM education at SOU. An education in any scientific field cannot be reduced to a single discipline; Chemistry and Biology rely on the Physics department to make their graduates strong applicants for both medical and academic doctoral programs."*

**Art/Fine Arts**
We received 23 comments related to the proposed reduction or elimination of the Art History BA and the Art BFA. A few alumni provided comments, but most of the comments were from community members who were upset to hear that SOU was proposing to eliminate arts programs in general (an inaccurate assumption). A faculty member commented:

*There is no money saved by eliminating the BFA degree. Its loss will cost SOU in recruitment, retention and image. The BFA is highly regarded, as an "honors" program.*

**French**
Forty-five comments were received regarding the potential elimination of the French major. Comments came from prospective, current and former students, community members and scholars. Several comments encouraged the continuation of both French and German majors.

From an alumna:
*"Learning French was a direct connecting piece for me in understanding how closely intertwined local and global concerns are.....studying a language creates an opportunity to study abroad, an experience which opens up immeasurable growth opportunities."*

From a parent of a prospective student:
*"As a parent who is on the college circuit tour with my child, one of the key features I look for in a college or university is a rich offering of and engagement with languages and cultures representing the kind of global perspective I desire for my child."*

**Biology**
One comment was received regarding the Botany Certificate in Biology, which appeared in the 5th quintile during prioritization and was recommended for elimination by program faculty. Eight additional comments were received supporting the biology program and faculty in general.

**Various**
We received 62 comments regarding a wide variety of programs, most of which were not being considered for elimination. Many of these comments were prompted by nervous faculty who had sent anxious communiqués to patrons regarding potential reductions in their areas even though the programs were not mentioned in the Provisional Retrenchment Plan for reductions.

**Other**
We received 13 comments asking that we retain specific faculty.

We received 17 comments that were generally about retrenchment. A few expressed concern about SOU needing to enact the Retrenchment article in the faculty contract. One expressed confusion about the data used. Several were supportive of the need to review our program offerings in light of the need for budget reductions but cautioned that we cannot retrench our way to sustainability. Two suggested that we sell facilities or cut athletics.

**University Planning Board**
As UPB includes representation from all sectors of the university, the board was asked to provide feedback on the provisional retrenchment plan as was done in 2007. UPB members met with representatives of affected programs to review and consider responses to the provisional plan. On March 7, 2014, UPB submitted a document entitled *Overview of Provisional Plan*. Recommendations from UPB have been woven into the Final Retrenchment Plan.

# Summary of Programs to Be Eliminated

| Program | 5-yr avg. grad rate |
|---|---|
| Art History BA | 2.4 |
| Business-Chemistry co-major | 0 |
| Business-Physics co-major | 0 |
| Music-Business co-major | 2.8 |
| Language and Culture, French Language and Culture Option, BA | 3.2 |
| Physics, Applied Option BA/BS | 1.4 |
| Physics, Standard Option BA/BS | 1.6 |
| Physics, Material Science Option BA/BS | 1.4 |
| Physics, Physics-Engineering Dual Degree Option BS | 0.2 |
| Physics, Engineering Physics Option BA/BS | 0 |
| Digital Art and Design minor | 2.3 |
| Film Techniques minor | 0.8 |
| French minor | 2.8 |
| Geography minor | 3.2 |
| Geology minor | 0.4 |
| German minor | 2.4 |
| Land Use Planning minor | 4 |
| Musical Theatre minor | 0.0 |
| Photography minor | 2.6 |
| Physics minor | 0.6 |
| Professional Writing minor | 0.0 |
| Biology, Botany certificate | 1.0 |
| Business, International Business certificate | 3.8 |
| Criminology & Criminal Justice, Forensics concentration | 11.4 |
| English & Writing, Special Studies concentration | 2.6 |
| Environmental Studies, Cultural Resource Management concentration | 0.2 |
| Environmental Studies, Ecology and Conservation concentration | 6.0 |
| Environmental Studies, Land Use Planning concentration | 2.8 |
| Environmental Studies, Sustainability and Policy concentration | 4.0 |
| Environmental Studies, Watershed Science concentration | 0.0 |
| Music, Music Composition concentration | 0.0 |
| Physics, Pre-Engineering Program | * |

\* This is a 2-year transfer program; therefore graduation rates are not applicable.

# Teach-Out

Normally, affected programs will be taught out in two years or less. In some cases, individual exceptions will be made. Program representatives will contact affected students and work with them to create a plan. Students with questions about affected programs should contact the Provost's Office at provostsoffice@sou.edu or at 541-552- 6114. Students must declare a program by April 1, 2014, to be included in the teach-out process.

# Major Programs to Be Eliminated

**Physics** has a small number of majors and low graduation rates (4.6 graduates on average across all options combined for the last 5 years). The major and minor will be suspended and the various options taught out.  Additionally the Pre-Engineering program will be eliminated. Continuing general physics support courses for Biology and Chemistry and the Astronomy general education course requires 63.5 ELU of the 153 ELU available.  Following the teach-out and reducing general education courses, we will save approximately 3 FTE in permanent Physics faculty lines.



Physics Major - Teach Out Plan
Faculty Instructional ELUs

| | 2013-2014 | 2014-15 | 2015-16 | 2016-17 |
|---|---|---|---|---|
| Releases/Other | 11 | 11 | 0 | 0 |
| Major Only | 56 | 56 | 55 | 0 |
| Support/GE | 86 | 86 | 41 | 41 |
| Total ELUs | 153 | 153 | 96 | 41 |



Degrees Awarded by Year
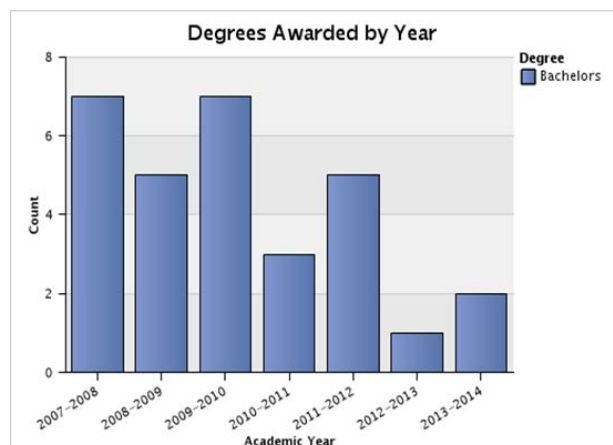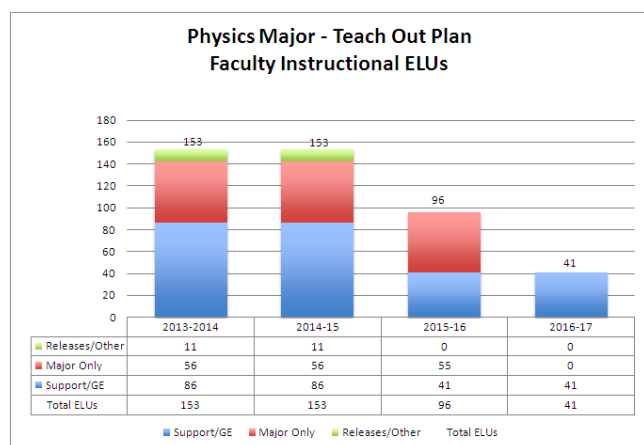
Although ranked in the fourth quintile in the Prioritization process, the Physics program received a large number of comments urging its continuation. Creating a streamlined, updated single option Physics major could be valuable to meeting SOU's mission as a regional university that provides access for place-bound students. The Director for the Division of Science, Technology, Engineering and Math (STEM) will work with emeritus and current Physics faculty and others (including community employers) to explore that option. Depending on the outcome of this process, we will consider whether a single option major will provide sufficient coursework for a Physics minor as well as articulation options for student transfers to engineering programs at Oregon Tech, Oregon State University, and other universities.

**Art History** is also a program with a small number of majors and very few graduates (2.4 graduates per year over the last 5 years) and was ranked in the fourth quintile in the Prioritization process. However, many students take courses in this area, and the Art History minor is well enrolled. There will be efficiency in rotation of courses and fewer course topics offered each year with the elimination of this major.
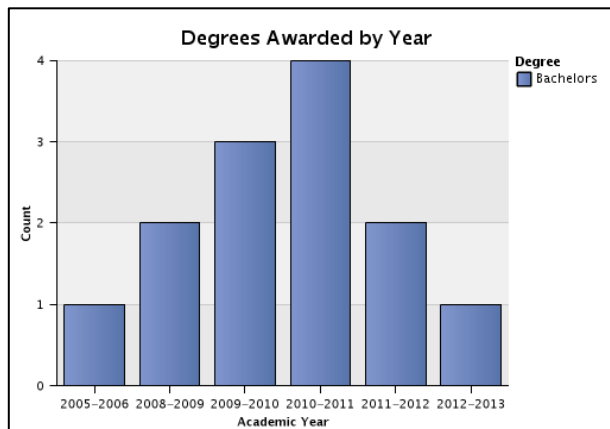


**French** has historically had a small number of majors and a low graduation rate (3.2 graduates per year over the last 5 years). However, we are committed to offering students a variety of language options to support international studies, study abroad, and students wishing to work overseas. We will retain a major and minor in Spanish as well as language studies in French, German, International Sign Language, Japanese, and Spanish. These language studies will change as student interest and needs change. We are keeping the Japanese minor because of our geographical position on the Pacific Rim.

This will allow a 1.0 FTE reduction in a permanent French faculty lines along with elimination of some contingent faculty that currently support the program.
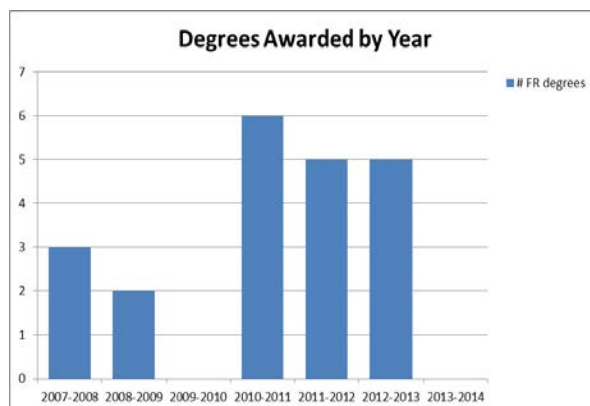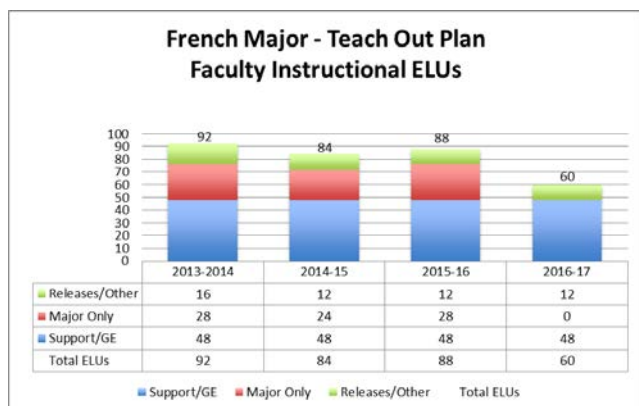


The **Geography**, **Geology**, and **German** majors were eliminated in the 2007 Retrenchment Plan. The associated minors are eliminated in this plan. German language will continue to be offered as discussed above. Some geology and geography content will be offered through the Environmental Studies major. This will allow for a reduction of 1.0 FTE in a permanent Geography faculty line.

# Reductions in Continuing Programs

Environmental Studies faculty have been actively working to focus and strengthen their major through elimination of the Land Use Planning minor along with the following concentrations: Cultural Resource Management, Ecology and Conservation, Land Use Planning, Sustainability and Policy, and Watershed Science. This streamlining will result in the savings of 0.78 FTE of permanent faculty. The current concentrations are being transitioned into the new program.

Curricular growth in several programs over time has resulted in loss of cohesion and clarity of purpose. Reductions are being made in anticipation of those programs consolidating and focusing to meet current student interests and career trends. Reductions in permanent faculty lines include: 1.47 FTE in Biology, 1.0 FTE in History, and 0.33 FTE in Economics.

With the introduction of alternatives in general education and new freshmen students bringing Advanced Placement and transfer credit, fewer traditional first-year courses are needed. Additionally, the newly formed Division of Undergraduate Studies will streamline offerings and enable scheduling efficiencies. Therefore, it is anticipated that fewer sections of University Seminar will be needed for first-year students. This will allow savings of 4 FTE in permanent faculty lines in this area.

Three co-majors in business (Business Chemistry, Business Physics, and Music Business) are being eliminated since they are not recognized by the Accrediting Council for Business Schools and Programs, the accrediting body for the SOU business program. These co-majors, also, have not been attracting sufficient student numbers for continuation.

The following programs have been offered for elimination as a result of the Prioritization process, declining student interest, and the availability of other curricular alternatives:

- ❖ **Digital Art and Design** is being discontinued in favor of the new Emerging Media and Digital Arts major.
- ❖ **Film Technologies**
- ❖ The **Photography** minor has been used to support the former Journalism major. With the advent of the Film, Television, and Convergent Media minor and concentration, and declining interest in the Photography minor, the program is being discontinued.
- ❖ **Professional Writing** minor no longer has the staffing or student interest to sustain it and is being eliminated.
- ❖ **Botany Certificate**
- ❖ **International Business Certificate**
- ❖ **Forensics Concentration** in Criminology and Criminal Justice (the concentration will remain in Chemistry)
- ❖ **Special Studies Concentration** in English and Writing

# Other Reductions

Other programs are adjusting their staffing to better meet current student interests and achieve budget reductions.  Although permanent faculty lines are not affected, these adjustments result in reductions of contingent faculty (yearlong and term-by-term) totaling 15.83 FTE spread across the university.

Music and Theatre are central to serving the southern Oregon region. However, in responding to cost projections in the recent OUS Cost Study, both programs are looking closely at cost drivers and ways to reduce expenses while maintaining program quality. Music has already engaged their faculty in an aggressive student recruitment program. Also, in spring 2014, the Music program eliminated contingent faculty for core courses, returning permanent faculty to those courses.

Theatre Arts, an impacted program, is expanding its new student cohort by sixteen students without adding additional teaching resources. Theatre Arts is also eliminating a significant portion of release time and making curricular changes to meet budget goals that will save 0.95 FTE in contingent faculty. Moreover, low-enrolled programs such as Music Composition are being eliminated.  With the merging of the Music and Theatre Departments into a Performing Arts Department, Musical Theatre minor was added to the program portfolio. The faculty have chosen to continue musical theatre productions but not continue the minor.

Computer Science has significantly revised the major program based on employer feedback and advice from a consultant. This revision resulted in consolidation of several tracks into a single degree program that better meets the needs of the regional workforce and saves 0.92 FTE in contingent faculty.

Education needs to be more efficient in offering a program that relies on a significant component of individualized instruction across different endorsement and licensure areas. Eliminating course sections through program realignment, decreasing low enrolled courses, re-examining cohort curriculum development, providing more efficient supervision of interns, and reducing permanent faculty release time will increase faculty productivity and result in a 5.33 FTE reduction in contingent faculty to meet budget needs.

In general, programs are looking at ways to streamline their curricula to reduce release time and numbers of sections and reduce contingent faculty by 2.0 FTE in Art, 0.5 FTE in Outdoor Adventure Leadership, 0.5 FTE in Economics, 1.5 FTE in Psychology, and 0.82 FTE in Foreign Languages.

# Academic Reorganization Process

The resignations of two academic deans and a third dean returning to the faculty gave SOU an opportunity to re-think academic organization. With a university focused on preparing students for a fast-changing economy and changing workforce, it had become increasingly evident that SOU should not rely on the historical approach to academic departments that has characterized American universities for over a hundred years: 21st century academic programs need to be more

interdependent and collaborative, more flexible and responsive to changing needs. Moreover, in a world of greatly reduced resources, SOU's academic areas needed to be more cost-effective and efficient.

A significant concern for SOU has been freshman-to-sophomore retention as well as graduation rates. In overall academic planning, increased emphasis has been placed on first-year programing and national best practices that strengthen student connection and retention. The SOU House Experience, Honors College, and other general education programing need to be organized and administered together in order to ensure a unified, intentional set of academic experiences for incoming students.

As a result of these concerns, academic restructuring involved consideration of a more efficient and effectively managed approach to general education and an organization that promoted both administrative oversight and program collaboration. At the same time, the restructuring needed to reduce faculty release time for administrative duties and promote resource allocation processes to support programing and scheduling that most effectively meet students' needs.

Initial discussions regarding alternative administrative structures began among academic administrators and department chairs in July and August 2013. At the President's retreat in September 2013, participants discussed approaches to reorganization models consisting of 5-8 larger academic units that would replace the current school/college and department structure. In October, as an outgrowth of discussions of these models, five models for academic organization, together with their potential financial savings, were presented in an open forum followed by an online comment period. Based on campus feedback, components of the various models were combined into a new organizational model which was presented to various campus constituencies, including department chairs and the Faculty Senate. Once agreement began to solidify around this model, discussions with department chairs and the Faculty Senate moved to job descriptions for the new academic leadership and how programs would be distributed within the academic divisions.

A model for reorganization was formally presented to and approved by the Faculty Senate in January 2014 and was taken to UPB. The approved model includes six divisions, each representing 25-40 faculty FTE and 6,000-12,000 SCH per academic term.  A seventh division provides leadership and coordination for general education areas, including University Studies, the House Experience, and the Honors College.

This extensive academic reorganization, in concert with a new service center and the recent integration of Academic and Student Affairs, contributes significantly to cost savings for SOU but also ensures both stronger administrative oversight and greatly needed collaboration among all areas in support of the mission and goals of the university.

## Academic Reorganization: Strengthening Focus and Increasing Efficiency

It is important to note that the retrenchment process is only one part of the work in Academic Affairs to reduce costs, strengthen focus, and respond to students' needs and interests. A key distinctive element for SOU is balancing foundational knowledge with applied, hands-on learning

that connects students with the people and the issues affecting our communities, our state, and beyond. Each year, over 2,000 SOU students work on internships, capstones, and undergraduate research in our region. Every Honors College student is connected with a mentor in the community and works on an applied project. Our House Experiences provide an integrated outcomes-based approach to general education that involves students with agencies, non-profits, and businesses in southern Oregon. The proposed Innovation and Leadership program offered at the Higher Education Center in Medford enables working students to attain a university degree in a cohort model that recognizes credit for prior experience.

SOU's new academic reorganization, which replaces a traditional College and School organization with seven divisional areas, emerged as the answer to the following questions: What organizational structure will reduce administrative costs while increasing accountability and oversight of academic programs? What structure will increase and support program collaboration, promote curricular planning that is responsive to changing needs and interests, and strengthen focus on what students need to be successful? What structure will best enable resources to be used efficiently and in alignment with SOU's mission and vision?

The newly formed divisions strengthen SOU's focus on educational models that reflect the specific needs of the professional workforce of southern Oregon and the needs and interests of SOU students.

**Undergraduate Studies**. This division brings together programs that students experience outside of their major, the programs traditionally labeled "general education." These courses have been historically dispersed throughout the university with little supervision over course rotation, class size, or disciplinary emphasis. In the current financial environment, greater efficiency in managing these elements, along with a strong need to ensure strong learning outcomes, requires rethinking of how these programs are managed.

Now organized under one director, all general education programs (University Studies, University Seminar, House Experience, Accelerated Baccalaureate, and Honors College) will be streamlined and strategic in their offerings and also strongly aligned with the university focus on retention, student engagement, and skills needed to be successful in college and in the workforce. With these course scheduling efficiencies, there will be less need for faculty who teach only in University Seminar as more faculty from other disciplines will be teaching in the first-year program.

**Business, Communication and the Environment.** This division brings together one of SOU's largest majors (Business Administration) with programs that promote expanded skill sets for students and establish distinctive programming reflecting our location in one of the most diverse bioregions in the world.

This division will strengthen curricular synergies; expertise in the Communications program in conflict resolution, for example, will be aligned with needs for managing environmental conflict and business communication, areas grounded in theory-based practices. Similarly, opportunities for collaboration in international communication and cultural understanding will assist students

who will be working in the not-for-profit and profit sectors of the regional economy. This division will promote scheduling efficiencies by managing class size and course rotations.

Another area of opportunity in this division is expanding on-line and hybrid instructional programs to non-traditional adult populations in the workforce. The proposed Innovation and Leadership program is an example of an accelerated bachelor degree program that combines the disciplines of business and communication to develop leadership skills for future managers.

**Education and Health.** Combining programs that contribute to regional needs, this division enables our education programs to collaborate more closely with health, physical education, and one of our newest and fastest growing programs, Outdoor Adventure Leadership. The challenge for this division is to increase student credit hour production with fewer faculty and staff resources. While no programs are being eliminated, class size and supervision of interns will need to be addressed to increase efficiencies and meet budget expectations.

**Science, Technology, Engineering, and Math.** This division brings together the STEM programs crucial to student quantitative reasoning skills and understanding of the natural world. These programs prepare students for a wide range of careers, but there remains a need to rethink the program portfolio. A major renovation of the science building will help drive better collaboration with the division's programs to promote interdisciplinary undergraduate research opportunities, best practices in teaching and learning, and greater productivity with grant applications.

The science programs have very few contingent faculty and do not have staffing flexibility to adjust to enrollment fluctuations. Other efficiencies in course scheduling and rotation will reduce the need for one or more permanent faculty in biology and chemistry. The current physics major and its options will be eliminated; however, study in physics will be offered in lower division courses that serve general education and other science programs, and a general review of an optimal and viable physics program for SOU students will be undertaken.

Based on feedback from local employers, computer science has recently undergone a curricular revision that supports efficiency in course scheduling and rotation.

Math provides many service courses for all university majors, and its size will expand or contract with enrollment.

**Center for the Arts.** Jackson County is the second largest arts cluster in the state after the Portland metro area. Major arts organizations such as the Oregon Shakespeare Festival, the Britt Festival, Oregon Cabaret Theatre, Craterian Theatre, and Camelot Theatre all depend on talent developed at SOU for internships, understudies, actors, technical personnel, and musicians for these various venues. Additionally, SOU has been named a Center of Excellence for the Fine and Performing Arts in the Oregon University System and has a reputation for excellent academic programs that goes well beyond the region.

This Center emphasizes SOU's role as a key generator of and foundation for the powerful arts sector in our region. Supporting and fostering this cluster, this innovative program grouping

includes not only the traditional performing and visual arts but also creative writing and emerging media and digital arts.

Although this group of academic programs is central to serving the region, scheduling and staffing efficiencies are necessary. Low-enrolled programs are being eliminated and reductions in staffing and faculty release time will drive budget savings.

**Language and Culture.** This division brings together the areas of English Literature, Linguistics, Foreign Languages, Anthropology, International Studies, Native American Studies, Gender Sexuality, Women's Studies, and Philosophy. This division will be challenged to be more efficient with class size and course rotation to meet financial benchmarks. However, new synergies will bolster and enrich interdisciplinary approaches to each discipline. This retrenchment plan eliminates the French major; however, the International Studies major is maintained to develop new approaches and practices that will strengthen SOU's focus on responsible global citizenship.

**Social Science and Public Affairs.** This division brings together two of SOU's largest majors, Psychology and Criminology/Criminal Justice, with social science programs such as Economics, History, Political Science, and Sociology, that provide foundations for students' understanding of society and social systems.

All programs in this division are highly cost effective; they effectively manage course size and rotation. However, a reduction in release time for administration will place more faculty time into teaching activities and will help offset the current and anticipated retirements that will occur in this division. In planning for the future, the division will need to utilize more contingent faculty, examine new curricular initiatives, and update curricula as new faculty are hired into the division over the next several years.

## Division Plans

Each division is required to develop a plan to reduce expenses, increase efficiencies, and further meet programmatic targets and goals as established by the institution and OUS.

A template will be developed by the Provost's Office, in consultation with the Chancellor's Office, that defines each division's budget allocation and enrollment targets as well as benchmarks and a timeline for attaining those targets. These plans, the first of which are due June 1, 2014, will be monitored quarterly to assure that divisions are meeting their respective targets through revenue enhancement (e.g., enrollment growth) and/or cost reductions (e.g., fewer numbers of contingent faculty).

Reporting metrics will be developed and monitored to measure and track student to faculty ratio, faculty release time, enrollment management (i.e., balancing student demand with frequency of course offerings), faculty loading, and financial targets. Progress of programs and opportunities for reinvestment within each division will be evaluated using the following indicators: student to faculty ratio, accountability for faculty release time, enrollment management (i.e., balancing

student demand with frequency of course offerings), equity in faculty loading, financial targets for savings and efficiencies, and curricular realignment.

Progress of programs within each division will use the following criteria:

- ❖ Class size information will be collected since it is an indicator of student demand, excess course offerings, and/or under-enrollment. The campus will calculate average class size and percent of maximum capacity in all courses, excluding labs, capstone courses, individual study, and similar type courses. The total number of low enrollment courses and their distribution will be collected and reported. Targets for minimum and average class sizes will be developed over spring term for general education courses, major courses, and graduate courses.
- ❖ Course release and non-teaching activities conducted by permanent faculty are necessary for effective teaching, scholarship, and research; however, excess release time necessitates the use and cost of overload and adjunct instruction. The AVP for Curricular Management will calculate and monitor the number of course release and non-teaching load units granted to permanent faculty relative to contractual expectations per the faculty collective bargaining agreement.
- ❖ Enrollment mix is directly related to tuition revenue. Overall measurements of enrollment will be shared with each division at the end of the 4th week of each term. Enrollment metrics will be monitored closely during the enrollment cycle (typically spanning spring through fall term).
- ❖ Programmatic savings outlined in the final retrenchment plan will be tracked to ensure execution of the plan as outlined. Expected and realized savings associated with academic personnel, services and supplies, and so on will be reported.

The performance metrics outlined above serve as progress indicators in meeting SOU's retrenchment goals. These metrics represent both operational and financial targets that, when met, will strongly support SOU's financial sustainability.

## Strategic Planning

Overall, this retrenchment plan is designed to accomplish several major objectives. One objective is to eliminate programs that have low enrollments and low student interest. Another objective is to size all programs to their projected enrollments for the next five years; this recalibration provides the flexibility to allow investment in existing programs that have capacity to grow and new programs that meet regional needs and student interests.

Although this retrenchment plan is not designed to change the essential character of SOU as an institution, it does support re-focusing SOU's program portfolio to use more effectively the resources available. The plan enables the university to reflect more intentionally on the needs of students preparing for the shifting social and economic environment of the 21st century.

As we received comments and feedback regarding the Final Retrenchment Plan, we also received a letter from Interim Chancellor Rose that provided guidelines or concepts to help guide our process. The following are two key paragraphs from that letter:

> *"First, there is a desire to ensure that a holistic, deliberative retrenchment process is embraced. As I have said in a variety of settings, a campus facing such difficult circumstances could choose a tactic of solely cutting to a certain target outcome. Alternatively, the campus could employ a strategy of honing the institution's greatest contributions and strengths, preserving those things that hew most directly to them, and reducing/eliminating other curricular components which are not aligned with the campus' greatest programming and mission-related assets."*

> *"The Board's and the Chancellor's Office collective recommendation is that you pursue the latter strategy, which will better serve to focus the institution's mission and direction. This will serve to enhance communications with existing and prospective students, faculty and staff, and external supporters. Statements within the preliminary plan that focus on reaching a certain fund balance suggest the prior approach. Although Board policy certainly has used a healthy fund balance as a kind of proxy for overall fiscal sustainability, they have moved to a more holistic methodology, with a healthy fund balance being merely a pre-condition for success in the retrenchment process and not an end in and of itself."*

These paragraphs indicate a shift in Board policy that must influence our retrenchment process. We began our process by looking primarily at ways of "cutting to a certain target outcome." Our goal has been to achieve a 5% fund balance by the end of the next biennium and a 10% fund balance in the following biennium.

With a somewhat different approach, we should aim for a healthy 10% fund balance but also think strategically, "honing the institution's greatest contributions and strengths," reducing or eliminating components not so strongly aligned with SOU's strengths and mission, and creating reserves that enable us to invest strategically in programs that reflect our strengths, that enhance our distinctiveness as an institution, and that strategically serve our region and 40-40-20 goals.

In this Final Retrenchment Plan, we continue to propose elimination of programs that enroll very small numbers of students. However, at the same time, through academic reorganization and planning, we are focusing strongly on curricular reform: changes that strengthen our mission, refine our focus, and serve our students more efficiently and effectively. Academic planning processes will contribute substantially to cost savings but, importantly, also to forward-looking curricular approaches that attract and support today's students and prepare them for employment opportunities. It is vital that we create a springboard for future growth and for the development opportunities that will arise in the future.

The academic planning process includes the following components:

- ❖ Implementing the program elimination and reduction scenarios described in this plan.
- ❖ Establishing the academic reorganization in spring 2014 and implementing program metrics and accountability. Academic division directors, working with the AVP for Curricular Management, will ensure that program costs are reduced and enrollment strategies are in place to enhance revenue. (Although the first of regularly scheduled division plans are not due until June 2014, programs are already making adjustments for spring term, with more efficient course schedules, reductions in release time, reductions in supplies and services, and planning for more focused curricula attuned to today's students and career opportunities.)

SOU's ongoing sustainability and success, however, depend on a strong vision and strategic plan for the entire university. As the university's current strategic plan has an end-date of 2014, it is now time to initiate broad strategic planning, building on the work that has been done over the past five years. Moreover, the changing realities of our enrollment mix, tuition options, and local and national economy require that the university re-focus and plan in an intentional way that is simply not possible through a retrenchment process.

Beginning in spring 2014, we will design and begin a planning process that will engage the campus in updating and re-focusing SOU's strategic plan to ensure flexibility and aggressive, nimble tactics that respond to key benchmarks such as enrollment and state allocation, establish priorities for reinvestment, and ensure achievement and maintenance of a healthy fund balance.

Since the reorganization of Academic Affairs will consume the time and energy of academic areas in spring 2014, much of the planning work this spring and over the summer will focus on and involve other areas of the university. In fall 2014, the work will move forward with the entire university, beginning with a major planning retreat.

The strategic planning process will build on recommendations made in the prioritization process and data from the capacity study and other sources. It will establish long- and short-term goals as well as priorities. Importantly, strategic planning will establish priorities for investment as the university rebuilds its reserves.

Many comments received over past months emphasized the importance of investing in areas central to SOU's success even while reducing costs overall. Over time, with an ongoing fund balance of 10% or higher, we will have sufficient financial flexibility to invest regularly in the university's priorities. In the short run, however, with only limited or one-time funds available, it will be important to invest carefully and strategically in high priority areas while still maintaining sufficient reserves. Strong strategic planning will be a foundation for mission-driven and data-driven decision making.

# University Re-Structuring

Southern Oregon University has been responding to state disinvestment for many years. Over the last five years as state allocations have significantly decreased, SOU has undertaken major cost reductions that have affected every administrative office of the university.

In 2009-10, the global economic downturn led to severe state reductions and reduction of SOU's reserves. Despite the need for deep reductions, the decision was made to preserve academic offerings and services that directly impact students. In that year, staff reductions totaled $1.485M: 10 admins and 4 classified staff were noticed, and 9 vacant positions were eliminated.

In 2012-13, continuing disinvestment from the state and significant PERS cost increases caused SOU again to significantly reduce expenses. In this period, Student Affairs and Academic Affairs were merged, and the Student Affairs areas were extensively reorganized. Staff reductions that year totaled $1.238M. These included 7 administrators, including the Vice President for Student Affairs and the Dean of Students, and 10 classified staff.

Across the campus, there have been staff reductions in areas such as the Student Health and Wellness Center, Human Resources, custodial and grounds staff, the bookstore, Marketing and Communications, and IT. We outsourced our food service. Administrative staff members are currently taking furlough days. Assessments of auxiliaries have increased, creating challenges in those areas.

With the creation of the academic divisions and the Service Center, SOU achieves budget savings from eliminating deans, moving to directors, and creating staffing efficiencies. Overall, we achieve a $304,000 savings from moving from deans to directors, $93,000 for reductions in faculty release time for administration, and $685,000 from staff reduction. These savings total $1.08M. With this reorganization, eleven currently budgeted staff lines are eliminated (2 administrative, 8 classified, 1 unclassified) through retirements, not filling open lines, and layoffs.

Staff reductions over time are illustrated by the following charts:



| | | Actual | | | | | Projected | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 10 yr Avg | Avg rate of change |
| Classified - FTE | 193.2 | 185.4 | 185.2 | 191.1 | 190.0 | 172.0 | 164.1 | 164.1 | 164.1 | 164.1 | 177.3 | |
| yr to yr chng | | -4.0% | -0.1% | 3.2% | -0.6% | -9.5% | -4.6% | 0.0% | 0.0% | 0.0% | | -1.73% |
| Admin - FTE | 197.1 | 184.1 | 180.0 | 177.8 | 172.6 | 176.2 | 174.0 | 174.0 | 174.0 | 174.0 | 178.4 | |
| yr to yr chng | | -6.6% | -2.2% | -1.2% | -2.9% | 2.1% | -1.3% | 0.0% | 0.0% | 0.0% | | -1.35% |
| Teaching - FTE | 217.5 | 222.7 | 232.6 | 255.0 | 243.7 | 238.4 | 215.6 | 195.3 | 183.4 | 177.5 | 218.2 | |
| yr to yr chng | | 2.4% | 4.4% | 9.6% | -4.4% | -2.2% | -9.6% | -9.4% | -6.1% | -3.2% | | -2.05% |
| Total - FTE | 607.8 | 592.2 | 597.8 | 623.9 | 606.3 | 586.6 | 553.7 | 533.4 | 521.5 | 515.6 | 573.9 | |
| Fall Admitted Student FTE | 3812.6 | 3824.9 | 4088.9 | 4255.0 | 4097.1 | 3932.8 | 3830.5 | 3788.4 | 3796.0 | 3796.0 | 3922.2 | |
| yr to yr chng | | 0.3% | 6.9% | 4.1% | -3.7% | -4.0% | -2.6% | -1.1% | 0.2% | 0.0% | | 0.01% |

used the FTE reductions for both teaching and service center staff included within the Final Retrenchment Plan document



| | FY 09 | FY 10 | FY 11 | FY 12 | FY 13 |
|---|---|---|---|---|---|
| Teaching* | $19,405,634 | $19,665,521 | $20,636,513 | $23,091,745 | $23,084,359 |
| Admin | $10,564,237 | $9,345,288 | $9,471,406 | $9,853,977 | $9,304,065 |
| Classified | $7,293,408 | $7,033,528 | $7,068,531 | $7,625,751 | $8,329,012 |
| Other** | $461,160 | $501,851 | $714,114 | $797,086 | $636,720 |
| Total | $37,724,439 | $36,546,188 | $37,890,564 | $41,368,558 | $41,354,155 |

* includes regular faculty & yrly adjuncts, term by term adjuncts, 600 hr faculty, and summer session
** Other: includes temps, irregular wage appts, and unclassified hourly employees

At this point, SOU cannot risk more staff reductions in most administrative areas. We are, in fact, too thinly staffed in a number of core offices. An internal OUS audit report in January 2013 notes that SOU's "ongoing budget reductions and increased workloads have contributed to a reduction in administrative and finance staff, which is a challenge considering the ongoing growth of accounting and compliance requirements."

Interim Chancellor Rose echoes this point in a recent memo: "The campus has been diligent for many years in holding the core program-related mission harmless, and focusing cuts on the non-academic side of the house. That said, OUS Internal Audits Division is concerned that your administrative support falls significantly below similar comparators, and cautions that potential 'segregation of duties' issues may arise. . . . The final plan needs to clearly communicate to the campus the level of non-academic cuts that have occurred in the past, and that the pathway forward must be now focused on the academic side of the house."

The creation of a service center (opening July 2014) will bolster administrative support by centralizing support services and cross-training staff. The service center, also, will provide needed assistance to the divisions in the newly formed academic organization.

## Enrollment Management and Admission Strategies

A key factor in all budget and organizational planning has been consideration of enrollment patterns and recruitment as well as retention strategies. SOU is moving forward aggressively with powerful initiatives that connect us with potential and existing students, their families, and alumni in Oregon and around the country. We have combined a sophisticated array of strategies with a refined ability to retrieve, analyze, and apply data.

An SOU enrollment and marketing team has been working strategically to positively impact enrollment; Preview Day numbers and "funnel data" for fall 2014 are extremely positive.

- ❖ Communication plans and recruitment efforts have been enhanced so that students are aware of first-year experiences, faculty-student engagement, and distinctive programs such as Houses, Accelerated Baccalaureate, Honors College, and PEAK jobs.
- ❖ Recruiters for specific territories receive weekly assessments and goals within primary (southern Oregon), secondary (Portland and the rest of Oregon), and tertiary (out of state) areas.
- ❖ We are employing successful strategies to reach greater number of underrepresented prospective students in targeted regions (such as Latino communities in southern Oregon).
- ❖ With new automated marketing tools, we have consolidated and refined management of contact/prospect information for targeted audiences. This unifies key marketing campaigns across departments.
- ❖ Social media properties, the SOU website, digital media productions, advertising, print materials, and other communications have created an effective shared messaging platform that is driving awareness, interest, and consideration among our target audiences. We are tracking triple-digit increases in reach and engagement.

- ❖ The Raider Freshman Academy, a summer bridge program, has been developed to help prepare freshmen (primarily Oregonians) who have been given provisional admission.
- ❖ College fairs, social media messaging, and specific campaigns are targeting Portland, Colorado, Arizona, Nevada, southern California, Idaho, and Washington.
- ❖ Added Raider receptions, SOU2YOU events, and high school counselor sessions are focusing on northern California and Portland.
- ❖ Staff members at the Higher Education Center in Medford have significantly strengthened connections with Rogue Community College, providing SOU application workshops to our local markets and more quickly capturing and assisting prospective students.

Fall enrollment patterns demonstrate strong potential, particularly with resident freshmen. To date for resident freshman there is an 8.23% increase in applications, a 13.39% increase in admits, and 76.47% increase in paid deposits from this time last year. Overall, including all freshmen and all transfer students, there is a 10.95% increase in applications, a 12.22% increase in admits, and a 43.75% increase in paid deposits.

Clear goals are in place for recruitment of new incoming freshmen and transfer students. Reasonable, achievable expectations demonstrate a 6.2% increase in new freshmen (40 students) and 3.4% in new transfers (18 students). Moreover, powerful new strategies are in place that could very positively affect retention for fall 2014 and beyond.

Despite these promising signals, we continue to use very conservative enrollment projections in our planning. The most current (but highly preliminary) OUS projections for fall 2014, for example, show a 2.6% decrease from fall 2013 and a 1.1% decrease between fall 2014 and fall 2015. After that, projections indicate flat or slightly increased enrollment for SOU through fall 2018.

As we strengthen the SOU brand, we will continue working on plans regarding WUE and differential tuition. In fall 2013, we implemented differential tuition for three programs: undergraduate programs in theatre arts and music and a graduate program in education. Further planning will being in summer 2014 as we plan for fall 2015.

Altogether, data-supported initiatives are creating stronger enrollment planning, more coordinated recruiting and retention strategies, and a stronger plan linking enrollment and budget planning for SOU.

# Retrenchment Reduction Distribution

| | FY 14 | FY 15 | FY 16 | FY 17 | FY 18 | . | Total | FTE | |
|---|---|---|---|---|---|---|---|---|---|
| **One-Time Savings** | | | | | | | | | |
| Fund Transfers | $3,000 | $3,200 | | | | | $6,200 | | |
| Faculty Furlough Days | | $253 | | | | | $253 | | |
| Annual Assessment Savings (Aux and Des Ops) | | $300 | $300 | $300 | $300 | | $1,200 | | (1) |
| Administrator Furlough Days | $94 | $94 | | | | | $188 | | |
| Total One-Time Savings | $3,094 | $3,847 | $300 | $300 | $300 | | $7,841 | | |
| | | | | | | | | | |
| **Permanent Savings** | | | | | | | | | |
| Academic Reorganization | $227 | $854 | | | | | $1,081 | 19.25 | (2) |
| Assumed Retirements | | | $316 | $316 | $316 | | $948 | 10.00 | (3) |
| Term-by-Term Adjuncts | | $100 | | | | | $100 | 3.31 | (4) |
| Undergraduate Studies | | | $124 | $152 | | | $276 | 4.00 | (5) |
| Business, Communication, & the Environment | | $160 | $145 | $46 | $75 | | $426 | 5.45 | (5) |
| Education & Health | | $244 | $228 | $174 | $111 | | $757 | 9.16 | (5) |
| Science, Technology, Engineering, & Math | | $278 | $430 | $161 | $37 | | $906 | 9.39 | (5) |
| Center for the Arts | | $122 | $160 | $68 | $68 | | $418 | 5.28 | (5) |
| Language & Culture | | $14 | $96 | $198 | $53 | | $361 | 3.66 | (5) |
| Social Sciences & Public Affairs | | $230 | $475 | $151 | $36 | | $892 | 10.68 | (5) |
| Total Permanent Incremental Savings | $227 | $2,002 | $1,974 | $1,266 | $696 | | $6,165 | 80.18 | (6) |
| Total Cumulative Permanent Savings | $227 | $2,229 | $4,203 | $5,469 | $6,165 | | | | |

(in thousands of dollars)

**Notes:**

1) Annual assessment for auxiliary departments and programs in designated operations increased to 10% of revenues. Savings impact is by year.

2) Savings result primarily from classified and administrator reductions.

3) Assumed retirements equals 10 FTE at estimated $95,000 annual salary and benefits over 3 years.

4) Term-by-term adjuncts equal 3.31 FTE at estimated $30,200 annual salary and benefits.

5) Division reductions include known retirements, permanent faculty, and year-long adjuncts.

6) Total permanent incremental savings includes $5.084M (60.93 FTE) in program elimination or reduction and $1.081M (19.25 FTE) in academic reorganization.

# Faculty Reductions

| | FY14 AY2013-4 | FY15 AY2014-5 | FY16 AY2015-6 | FY17 AY2016-7 | FY18 AY2017-8 | Totals |
|---|---|---|---|---|---|---|
| **Center for the Arts** (5.28 FTE) | | | | | | |
| Known retirements | 0 | 0.83 | 0.50 | 0.50 | 0.50 | 2.33 |
| Permanent | 0 | 0 | 0 | 0 | 0 | 0 |
| Adjunct (yearlong) | 0.45 | 0.50 | 2.00 | 0 | 0 | 2.95 |
| Subtotal for Arts | 0.45 | 1.33 | 2.50 | 0.50 | 0.50 | 5.28 |
| **Division of STEM** (9.39 FTE) | | | | | | |
| Known retirements | 0 | 2.61 | 0.39 | 0.67 | 0.33 | 4.00 |
| Permanent | 0 | 0 | 3.47 | 1.00 | 0 | 4.47 |
| Adjunct (yearlong) | 0 | 0.46 | 0.46 | 0 | 0 | 0.92 |
| Subtotal for STEM | 0 | 3.07 | 4.32 | 1.67 | 0.33 | 9.39 |
| **Division of Education and Health** (9.16 FTE) | | | | | | |
| Known retirements | 0.83 | 0.50 | 0 | 1.22 | 0.78 | 3.33 |
| Permanent | 0 | 0 | 0 | 0 | 0 | 0 |
| Adjunct (yearlong) | 0 | 2.68 | 3.15 | 0 | 0 | 5.83 |
| Subtotal for ED/Health | 0.83 | 3.18 | 3.15 | 1.22 | 0.78 | 9.16 |
| **Division of Business, Communication and the Environment** (5.45 FTE) | | | | | | |
| Known retirements | 1.62 | 1.45 | 0.61 | 0.33 | 0.66 | 4.67 |
| Permanent | 0 | 0 | 0.78 | 0 | 0 | 0.78 |
| Adjunct (yearlong) | 0 | 0 | 0 | 0 | 0 | 0 |
| Subtotal for BCE | 1.62 | 1.45 | 1.39 | 0.33 | 0.66 | 5.45 |
| **Division of Social Science and Public Affairs** (10.68 FTE) | | | | | | |
| Known retirements | 2.17 | 1.62 | 1.56 | 0.72 | 0.28 | 6.35 |
| Permanent | 0 | 0.33 | 2.00 | 0 | 0 | 2.33 |
| Adjunct (yearlong) | 0.5 | 0 | 0.50 | 1.00 | 0 | 2.00 |
| Subtotal for SS/PA | 2.67 | 1.95 | 4.06 | 1.72 | 0.28 | 10.68 |
| **Division of Language and Culture** (3.66 FTE) | | | | | | |
| Known retirements | 0.40 | 0.11 | 0.33 | 0.61 | 0.39 | 1.84 |
| Permanent | 0 | 0 | 0 | 1.00 | 0 | 1.00 |
| Adjunct (yearlong) | 0 | 0 | 0.82 | 0 | 0 | 0.82 |
| Subtotal Lang/Culture | 0.40 | 0.11 | 1.15 | 1.61 | 0.39 | 3.66 |
| **Division of Undergraduate Studies** (4.00 FTE) | | | | | | |
| Known retirements | 0 | 0 | 0 | 0 | 0 | 0 |
| Permanent | 0 | 0 | 2.00 | 2.00 | 0 | 4.00 |
| Adjunct (yearlong) | 0 | 0 | 0 | 0 | 0 | 0 |
| Subtotal UG Studies | 0 | 0 | 2.00 | 2.00 | 0 | 4.00 |
| **TOTALS** (60.93 FTE) | | | | | | |
| Known retirements | 5.02 | 7.12 | 3.39 | 4.05 | 2.94 | 22.52 |
| Permanent | 0 | 0.33 | 8.25 | 4.00 | 0 | 12.58 |
| Adjunct (yearlong) | 0.95 | 3.64 | 6.93 | 1.00 | 0 | 12.52 |
| Anticipated retirements | 0 | 0 | 3.33 | 3.33 | 3.34 | 10.00 |
| Adjunct (txt) | 0 | 3.31 | 0 | 0 | 0 | 3.31 |
| TOTAL | 5.97 | 14.40 | 21.90 | 12.38 | 6.28 | 60.93 |

# Budget Pro Forma

| (in thousands of dollars) | 2011-13 Biennium | | 2013-15 Biennium | | 2015-17 Biennium | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | 2011-12 Actual (000's) | 2012-13 ACTUAL (000's) | 2013-14 FORECAST (000's) | 2014-15 FORECAST (000's) | 2015-16 FORECAST (000's) | 2016-17 FORECAST (000's) | 2017-18 FORECAST (000's) |
| **Budgeted Operations** | | | | | | | |
| State Appropriations | 12,642 | 13,195 | 13,775 | 15,200 | 14,624 | 15,666 | 15,287 |
| Special State Allocation for Investment | | | | 500 | | | |
| Tuition, net of Remissions | 32,837 | 33,526 | 32,708 | 31,563 | 32,123 | 33,078 | 33,991 |
| Other | 1,657 | 1,851 | 1,823 | 2,101 | 2,135 | 2,195 | 2,258 |
| **Total Revenues & Transfers In** | 47,136 | 48,572 | 48,306 | 49,364 | 48,882 | 50,939 | 51,536 |
| | | | | | | | |
| Personnel Services | (42,343) | (42,360) | (43,846) | (43,283) | (42,320) | (42,639) | (43,635) |
| Supplies & Services | (6,534) | (9,200) | (6,751) | (5,587) | (5,619) | (6,021) | (6,570) |
| Program Investment | | | | (250) | (250) | (250) | (250) |
| Capital Outlay | (275) | (188) | (188) | (125) | (125) | (125) | (125) |
| **Total Expenditures & Transfers Out** | (49,152) | (51,748) | (50,785) | (49,245) | (48,314) | (49,035) | (50,580) |
| **Net from Operations and Transfers** | (2,016) | (3,176) | (2,479) | 119 | 568 | 1,904 | 956 |
| Transfers In | 500 | 0 | 2,938 | 3,200 | 0 | 0 | 0 |
| Transfers Out | (166) | 328 | (565) | (501) | (501) | (501) | (501) |
| Change in Fund Balance | (2,182) | (2,848) | (106) | 2,818 | 67 | 1,403 | 455 |
| **Beginning Fund Balance** | 5,551 | 3,869 | 1,019 | 913 | 3,731 | 3,798 | 5,201 |
| **Ending Fund Balance** | 3,869 | 1,019 | 913 | 3,731 | 3,798 | 5,201 | 5,656 |
| % Operating Revenues | 8.1% | 2.1% | 1.9% | 7.6% | 7.8% | 10.2% | 11.0% |

Primary Assumptions:

Goal of 5% ending fund balance by FY15 and 10% or better by FY17

State Allocations FY16 and beyond - 3% per biennium

Enrollment (decrease) - FY15 (2.6%), FY16 (1.1%), FY17 .2%, FY18 0 (1% = approximately 45 student FTE)

Tuition increase - 0% FY15, 3% FY16 & 17, 3% FY18

Salary Increase pool - 3% FY16, 4% FY17, 5% FY18

Assumes worst case

# Benchmarks

The following benchmark timeline will indicate specific points at which data will be gathered, either by the campus or by Chancellor's Office staff, and compared against pre-established goals.

- ❖ **March 2014** Final Retrenchment Plan—finalized timeline, metrics, and benchmarks submitted to Chancellors' Office
- ❖ **April 2014** Initiate strategic planning process (primarily academic support areas)
- ❖ **June 2014** Business plans due from academic divisions
    - o Enrollment funnel report for Fall 2014
- ❖ **July 2014** Fund balance status report
- ❖ **August 2014** Enrollment funnel report for Fall 2014
    - o State allocation determined
- ❖ **September 2014** Initiate all-campus strategic planning
- ❖ **November 2014** Fall Term enrollment and retention report
    - o Recalibration of Retrenchment Plan based on 4th week enrollment data
    - o Quarterly benchmarking report to Board
    - o Consultation with Chancellor's Office and Board
- ❖ **February 2015** Quarterly benchmarking report to Board
- ❖ **May 2015** Quarterly benchmarking report to Board
- ❖ **July 2015** Fund balance status report
- ❖ **September 2015** Quarterly benchmarking report to Board

# Conclusion: Building on the Past, Moving Into the Future

Founded over 140 years ago as a teachers' college, Southern Oregon University is committed to serving our region and the State of Oregon. SOU serves a large percentage of Oregonians. Many are the first in their families to attend college. It is our moral imperative to maintain access and affordability. As a small university experiencing the "new normal" of public higher education, we are forced to cut costs and narrow offerings. Nonetheless, SOU remains committed to regional stewardship and outstanding academic programming as well as to nationally recognized best practices that promote student success and retention.

As a powerful economic engine of our local communities, over 85% of our graduates remain to work in Oregon. The most important contribution SOU makes to the region and to the state is graduating well-prepared students with skill sets that are crucial to civic and economic success. The most important contribution we make to students is enabling them to graduate with strong communication and problem-solving expertise as well as knowledge and experiences that enable them to be successful in current and future careers.

**Strategic Planning**. In 2008, following extensive planning processes, SOU published a five-year strategic plan entitled *Building the New SOU: Strategic Plan for Distinction and Sustainability 2009-2014*. This plan and the university's mission statement form the foundation for our department and area planning and for our NWCCU accreditation, which was reaffirmed in February 2014.

The strategies and tactics of our strategic plan have been regularly updated in light of annual goals and benchmarks; however, the four strategic goals of the plan remain in place:

- ❖ **Academic Distinctiveness and Quality**: Heighten and sustain a powerful university culture that supports and inspires intellectual creativity, connected learning, and a passion for making a difference.
- ❖ **Commitment to the Arts and the Region**: Ensure that curricula, research, and outreach reflect the environmental, economic, and cultural priorities of our region.
- ❖ **Community Partner and Catalyst**: Strengthen the University's role as economic and cultural partner and catalyst for external communities.
- ❖ **Financial Sustainability**: Increase the University's fiscal stability through enrollment management, budget development and alignment, strategic partnerships, and fundraising.

**Data-Gathering**. In 2011-2012, SOU issued a *Report on Capacity*, developed by staff and faculty that analyzed data from program areas across campus. The analyses were intended to help us build a "sustainable fiscal environment that reflects the realities of our declining state support and limitations on our ability to replace declining state resources with enrollment revenue." In concluding remarks, the report states that SOU's curriculum "is too diverse for our current and near future student body. Tightening all aspects of the curriculum could lead to better use of scarce resources. Given the reductions in state support and a limited ability to raise tuition, we may not be able to maintain current class size ratios."

A number of the findings in the *Report on Capacity* were underscored and expanded in 2013-14 with the report from OUS entitled *Southern Oregon University Departmental Enrollment, Revenues & Costs 2012-2013*.

**Prioritization**. In 2012-13, SOU undertook prioritization of academic and academic support programs, a process that involved broad participation across campus. This process was designed to help inform the next iteration of SOU strategic planning since the plan currently extends only through 2014. The Introduction to the *Academic Program Prioritization Report* highlights the centrality of SOU's mission and strategic goals to the prioritization process:

> [I]nstitutions, particularly regional, comprehensive institutions like Southern Oregon University, increasingly find themselves in the midst of budget crises that drive critical decisions and planning processes. It is within this context that the process of academic program prioritization was developed. The objective of this process is to find the proper balance in allocating resources among programs deemed essential to achieving the mission and strategic goals of the institution. It is our hope that the work represented by this report will contribute to a strategic planning process that achieves such a balance and results in a more distinctive and sustainable SOU.

Based upon agreed-upon criteria, particularly centrality to mission, the prioritization report listed academic programs in quintiles of 33 each. Although the prioritization process was not specifically directed at cost-cutting, programs in lower quintiles were understood to be candidates for review, restructuring, consolidation, or elimination.

**Retrenchment**. This final retrenchment plan is a significant stage of an ongoing consultative process. The plan has been informed by strategic planning and data-gathering initiatives as well as by comments received throughout the process. It is important to state that, unlike the prioritization process, retrenchment is not intended primarily as a foundation for strategic planning or a vehicle for re-shaping the university's mission and goals. However, the retrenchment process does provide an opportunity to strengthen the university's focus, to implement recommendations from the *Report on Capacity* and the *Academic Program Prioritization Report*, and to achieve the financial sustainability that is and will continue to be a key goal of the university's strategic planning.

The programs slated for elimination in this plan have not attracted sufficient numbers of students to be viable in this challenging economic environment. However, even while going through the difficult process of eliminating some academic programs, we will continue to support and invest in an array of offerings that prepare students effectively for a variety of opportunities after graduation.

SOU's distinctive curriculum will continue to include a balanced mix of programs appropriate to a small regional university:

- ❖ Programs that prepare students for professional careers in areas such as business, education, criminal justice, and health-related fields;
- ❖ Programs that respond directly to our unique region, which cares deeply about and provides employment opportunities related to the arts and the environment; and
- ❖ Programs that prepare students to understand the human and natural world while also connecting them with career opportunities through undergraduate research, capstone experiences, hands-on learning, and interdisciplinary approaches.

In the new environment of public higher education, SOU must ensure that our programming brings significant and measurable value to our region and our state. The difficult decisions embedded in this retrenchment plan reflect not only what we can no longer afford but also what SOU *is* and will continue to be as we serve the students and citizens of Oregon.

This final retrenchment plan is the culmination of a complex and difficult process. We have used strategies that will create financial sustainability with minimal impacts on students while maintaining and enhancing the core values and strengths of Southern Oregon University.

The strategies outlined in this plan involve hard choices and difficult decisions. We recognize that our faculty and staff care deeply about our university. There will be impacts to them personally, to their families and to our community. We have made every possible effort to mitigate these impacts to the greatest degree possible while ensuring the long-term viability of SOU.

We will continue through a collaborative process to construct a new academic organization and will continue to ensure that SOU meets the needs and interests of a diverse and changing student body.

Despite challenges, Southern Oregon University will emerge from this process a stronger organization, nimble and proactive, as we look forward to a promising future.

# SOUTHERN OREGON UNIVERSITY

# A REPORT ON CAPACITY

## July 2012

**Task Force Members**

James Klein, Chair
David Carter
Echo Fields
Drew Gilliland
Steve Larvick
Chris Stanek
Rick Weems

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## Introduction

This report is purposely limited to analyzing and providing information about programs in funds supported by state allocation and tuition and some fees.  Auxiliaries and programs funded by the student incidental fee are not covered in this phase of the report.

The recommendations that follow are the result of reviewing data collected on all aspects of university operations.  The attached appendices provide the data sets on which these recommendations are made.  Another part of this review was collecting information from focus groups of individuals from all employee groups.  Those reflections are added where appropriate in the background for these recommendations.

The university is at a turning point.  There is general fatigue with consistent cost cutting and a sincere desire to develop a sustainable fiscal environment that reflects the realities of our declining state support and limitations on our ability to replace declining state resources with enrollment revenue.  How that plan develops will determine in all respects how we use our current capacity and develop our resources for the future.

In the focus groups, it was clear that the university needs to determine a vision and move forward toward meeting that vision.   We are divided on what that should be – more well-prepared students or a commitment to access for regional students, or both.  In the faculty we are divided on how we interact with students.  Some want to spend more time on research and teaching and less on advising; others prefer a more balanced approach, and others feel too much time is spent on committee work and meetings.  Some feel that our cost driven approach to staffing has resulted in less transparency.  Others feel that some management decisions are arbitrary and promote a greater sense of anxiety.

Feedback also demonstrated that there is a great respect for the place that is SOU: it encourages and rewards innovation and creativity; it rewards collective success over individual success; it promotes cooperation and communication between units;  and it values respect in the workplace.

While it is not the place of this study to chart the future, the task force hopes that the recommendations contribute to the conversations that will determine that direction.  Since this study was designed to chart scenarios for the next decade, the Office of Institutional Research developed a dynamic tool that can be used to chart various ways the university may move forward.  Three scenarios are provided as examples to provide context on strategic directions and planning.

## Summary and Recommendations

### 1. Finances

**Undergraduate Revenue:**
For 2011-12 the state subsidy per Full Time Equivalent Student (FTE) – an average of 15 Student Credit Hours (SCH) per resident undergraduate student is $2,136 with an average annual tuition of $5,625 for total revenue of $7,761/FTE. However we provide remissions and merit aid of $2,299,215 for an average discount of $908 which drops the average revenue per FTE to $6,853. Total annual FTE in this category is 7,179 with a Fall FTE of 2,532.

Similarly, WUE (Western Undergraduate Exchange) income is $8,438/FTE and the discount per FTE with remissions and merit aid is $446 for an average annual revenue per FTE of $7,992. Total annual FTE in this category is 2,642 with a Fall FTE of 925.

The average cost to educate a typical 1.0 student FTE is nearly $10,000*, so each resident undergraduate and WUE student cause a budget shortfall of $3,147 and $2,008 respectively.

Non-resident undergraduates fall into either an alternative WUE program or a full-paying out-of-state rate which on average amounts to $14,902 per FTE after remissions. Unfortunately the total annual FTE in this category is only 456 with a Fall FTE of 159.

The average revenue generated across all student types (resident UG's, WUE's, non-res, GR's, etc) is $7,956 so on average we fall short approximately $2,000 for every student.

**Graduate Revenue:**
The average revenue for resident graduate per FTE (12 SCH) is $12,600. The state subsidy per FTE for these students is $2,522 for a full FTE income of $15,122 and $13,323 for education programs on the reduced differential plan. There are very few fee remissions for students in these categories and total annual FTE in this area is 301 for regular graduate students and 458 for students paying differential tuition in education programs. Fall FTE amounts to 96 and 150 respectively.

For non-resident graduates, tuition is $16,200. Very little enrollment exists in this area, specifically 70 annual FTE with a Fall FTE of 26.

**Summary:**
Obviously we need to rethink our enrollment mix to reflect a higher per FTE income consistent with expenses and/or find efficiencies in our curriculum that promote a lower per FTE cost, especially for undergraduate students. Since most of our undergraduates enrollment is in Oregon and WUE students, we lose a considerable amount of money on each demographic. It is for this reason that SOU spent into its fund balance by $1.7M this year to cover the difference between income and expenses.

\* Provided by OUS Chancellors Office an taken from audited financial statements to includes 100% of instruction, student services, academic support, and a prorated amount for physical plant operations, institutional support, and other expense deductions based on their percentage of expense to the total.

Additionally SOU's undergraduate tuition will increase an average of 9.9% for AY 12/13. The non-fundable, non WUE undergraduate SCH is 3% of total enrollment and 7% occurring in graduate programs, both demographics that make money.

> **Recommendation:** *Since 65% of our SCH is in resident undergraduates and 24% are WUE undergraduates, we lose a considerable amount of money on each. Non-resident UG SCH are currently 4% of enrollment with around 7% in graduate programs, both demographics that make money. We need to rethink our enrollment mix to reflect a higher per FTE income consistent with expenses and/or find efficiencies in our curriculum that promote a lower per FTE cost, especially for undergraduate students.*

## 2. Facilities

**Classroom Space:**
Our scheduled hour utilization for Ashland campus classrooms from 8:00 a.m. -5:00 p.m. is around 80% overall. However the seating capacity of individual rooms being used is only at 52% of room size. There is certainly a shortage of space during the 10:30-2:30 hours, but in the late afternoon there is capacity and the evening hours are not utilized to any great extent. By utilizing Friday/Saturday, and evening hours, the campus has room to expand its program for the foreseeable future.

At the Higher Education Center the hour utilization rate is 31% with a seating capacity rate of 32% with most course offerings after 4:00 p.m. and utilizing some capacity on Saturdays.

When a longer class day (9:00 a.m. to 10:00 p.m.) is considered, utilization rates drop to 45% for the Ashland campus and 18% for the Medford campus.

> **Recommendation:** *We have created a day campus and an evening campus with duplicative programs thirteen miles apart. The university should have, to the extent possible, programs offered at the two campuses throughout the day and evening and distinctive to each campus.*

> **Recommendation:** *In order to improve the fill rate of classrooms during periods of heavy use, the university should centralize room scheduling in one office that considers access, proximity, and physical considerations.*

**Laboratory Space:**
Currently most science laboratory classes occur Tuesday, Wednesday and Thursday from 9:00 a.m. to 3:00 p.m. and typically not scheduled over the noon hour. Biology and chemistry labs have approximately an 80% fill rate for their designated lab spaces. Most labs are located in the Science Complex which is scheduled for a major remodel beginning in 2013. The GIS lab is located in Taylor Hall.

The only critical areas where lab space is needed is in the performing arts and in Physical Education. The addition of a dance curriculum affects both of these areas. A room in the basement of the Music Building has been converted into a dance/movement studio, but that addition is not sufficient to meet current lab needs. Rehearsal space is also needed in the music and theatre areas.

> **Recommendation:** *When an opportunity arises for remodeling, consider designing labs that can be used for multiple purposes or departments.*

> **Recommendation:** *Expand lab daily lab schedule to include Monday and Friday's and from 8:00 a.m. to 8:00 p.m. in the evening.*

**Computer Labs:**
We currently have in excess of 80 computer labs, seating from 2-55 people. Information Technology is deploying a program called *LabStats* in most labs and they hope to have complete coverage by the Fall, 2012. With LabStats, we can determine how often the computers are used, what programs are run, and how long the computers and programs are used. This information will be helpful in determining next steps for managing and maintaining our computer lab resources.

Recent surveys and an on-going usage study of open computer labs and specialized labs on campus show preliminary underutilization of computers for academic use. Specialized academic software and lab space is in demand, but departmental labs with specialized software appear overall underutilized. Computers in many of the department-specific labs are outdated.

**Office Space:**
The campus currently is at 95% of capacity of designated office space, with the other 5% used for storage. However, how and to whom this space is allotted should be reviewed. SOU also averages over 4 copy rooms per bldg and every dept has a "business" space to serve the department.

> **Recommendation:** *Review office space needs and require sharing for adjunct, and part-time faculty. Re-purpose or build new office space near teaching or lab space with preference given to those teaching in proximity to classroom/lab spaces.*

**Other specialized space:**
For general study space (library, study nooks, conversation modes, etc.) observations reported by the library staff and building managers indicate ample formal study space available, but not enough informal small group space available in the academic buildings.

> **Recommendation**: *Continue to develop small group meeting spaces in all academic buildings with comfortable seating and wireless accessibility.*

> **Recommendation:** *Review current use of computers with specialized software needs and consider cross-discipline use of lab space. Convert department computer lab space to small group study spaces in academic buildings.*

## 3. Enrollment

SOU has seen steady growth from Fall, 2007 through the 2011-12 academic year after an enrollment decline in years 2004-2007. Until Fall, 2011, the highest enrollment was recorded in Fall, 2003 with 5,351 students (exempting Advanced Southern Credit students). The lowest enrollment point in the past ten years was recorded in the 2007-2008 academic year with 4,630 students (exempting ASC students). That figure grew by Fall, 2011 to 5,465 students(exempting ASC and OLLI students), an increase of 835 students or 18%.

The Medford campus saw its highest enrollment in Winter, 2009 with 1,200 SCH followed closely in Fall, 2011 with 1,100 SCH. Currently the largest disciplines offering courses at the HEC are Business and Psychology, followed by Education. Disciplines that have seen recent growth include Computer Science, which now has a degree completion program at the HEC, and Environmental Studies (Geography). Education and Business have heavier carrying loads per student than Psychology indicating students may be traveling between campuses more in this discipline than others.

Course size averages have remained constant over the review period of 2007-2011 with average class sizes at 24 and the median at 21. This suggests that as enrollment has grown, additional sections have been opened to accommodate the growth.

In the University Studies Curriculum Strands enrollment trends in the Fall 2010, and Fall 2011 are as follows:

**Undergraduate Lower Division**:
Strand E (Humanities and Arts) 24 sections with average enrollment of 33.4 students. However this varies widely by discipline with English and Writing courses averaging 21 students on the low end and Communications with an average of 115 on the high end. Two courses were offered online.

Strand F (Social Science) 44 sections with an average enrollment of 36 students. Enrollment in these courses vary less widely with a low of 19 in Education and a high of 48 in Psychology. Eight sections were offered online.

Strand G (Science) 27 sections with an average enrollment of 44. Three large sections skew the average class size. Biology 101 and 211, Chemistry 201, and Physics 112 have enrollments over 100. When these courses are removed, the average in other courses is 31 students. No online courses were offered in this strand.

**Undergraduate Upper Division:**
Strand H (Science, Technology, and Society) 10 sections with an average enrollment of 33. One online course was offered.

Strand I (Citizenship and Social Responsibility) 26 sections with an average enrollment of 26. Five online sections were offered.

Strand J (Diversity and Global Awareness) 20 sections with an average enrollment of 28. Four sections were offered online.

**Major Programs Headcount:**

Major counts have varied based on discipline.  Given an 18% growth in students from 2007 to 2011, the following majors (includes primary and secondary declarations) grew by percentage faster than overall growth:

Math ————————————————————————100%
CPME ————————————————————————85%
Education ——————————————————————75%
Masters in Management ———————————————85%
Computer Science ————————————————————54%
Health/Physical Education —————————————48%
Biology and History/Political Science ——————31%
Criminology/Criminal Justice ——————————29%
Psychology ——————————————————————25%
Music ———————————————————————————21%
Environmental Studies, SSPC, and Theatre Arts ————18%.

However, if you look at growth by numbers of declared majors during this period, the impact is quite different:

Education ——————————————————————239
Psychology ——————————————————————108
Health/PE ————————————————————————83
Criminology/Criminal Justice —————————77
CPME ————————————————————————————68
Computer Science ————————————————————62
Biology ——————————————————————————59
History/Political Science and Theatre Arts ————39
Math ———————————————————————————36
SSPC ——————————————————————————34
Masters in Management ———————————————29
Environmental Studies ———————————————20
Music ——————————————————————————19

A new major of two years, Outdoor Adventure Leadership currently has 70 majors, and a new proposed major in Emerging Media and Digital Arts shows potential for large enrollment increases.

Other majors increased less than overall campus enrollment:

Art/Art History———————————————— 8%          15 students
Business Administration ————————————— 14%          84 students
Literature/Languages ————————————— 4%          11 students
Only one major lost students, Communication ——— -6%          -14 students

**Student Credit Hours:**

SCH, which reflects actual FTE and hence revenue received, has grown by 18% overall during the review period, yet the growth by department show a different pattern:

| | | |
|---|---|---|
| Art/Art History | 540 SCH | 22% |
| Biology | 1406 SCH | 30% |
| Business | 1140 SCH | 22% |
| Chem Physics Material Engr | 414 SCH | 14% |
| Chemistry | 8 SCH | 0% |
| Physics | 404 SCH | 32% |
| Engineering | 2 SCH | 2% |
| Communication | -169 SCH | -7% |
| Computer Science | 420 SCH | 27% |
| Criminology/Criminal Justice | 533 SCH | 17% |
| Education | 1236 SCH | 42% |
| Env Studies (Geography and Geology) | 686 SCH | 53% |
| History/Political Science | 886 SCH | 38% |
| History | 647 SCH | 38% |
| Political Science | 339 SCH | 39% |
| Literature, Language, and Philosophy | 1117 SCH | 18% |
| English and Writing | 679 SCH | 29% |
| French | 65 SCH | 12% |
| Spanish | 73 SCH | 4% |
| Philosophy | -155 SCH | -19% |
| Mathematics | 1500 SCH | 42% |
| Music | 203 SCH | 15% |
| Psychology | 600 SCH | 13% |
| Soc Sci Policy and Culture | 1030 SCH | 24% |
| Anthropology | 478 SCH | 50% |
| Economics | 10 SCH | 0% |
| Gender, Sexuality, and Women's Studies | 8 SCH | 6% |
| International Studies | 83 SCH | 5% |
| Native American Studies | 168 SCH | 73% |
| Sociology | 66 SCH | 5% |
| Theatre Arts | 403 SCH | 23% |
| University Seminar | 378 SCH | 10% |

**Degrees Conferred:**

The following programs have an average number of graduating seniors that are less than 10 students per year (four year average between 2007 to 2010):

| Undergraduate Programs: | Graduate Programs: |
|---|---|
| Early Childhood Education ......... 6 | Environmental Education ……………….. 6 |
| French ........................................ 3 | Spanish Language Teaching ……………8 |
| Physics ....................................... 6 | Theatre Studies in Prod & Design …… 5 |

These undergraduate programs have an average number of graduates between 10-15 students per year (four year average between 2007 to 2010):

Anthropology ........................... 11
Chemistry ................................ 13
Economics ............................... 10
International Studies ................ 10
Mathematics ........................... 10
Music ...................................... 14
Political Science ....................... 12
Spanish .................................... 11

All other degree programs graduate on average more than 15 students per year.

**Summary:** We have several low enrolled majors while others are experiencing significant growth. Currently our Faculty/Student Ratio (includes all teaching faculty) is 18:1. Under enrolled sections (fewer than 10) increased from 40 in Fall, 2003 to 70 in Fall, 2011. Overall course sections in Fall, 2011 increased 12.5% from Fall 2003 to Fall 2011, while student credit hours increased only 6.6%. At the same time on-line enrollment grew by over 700% in the past eight years, eclipsing the overall enrollment growth during the same period.

> **Recommendation**: *The campus should complete a comprehensive review of the University Studies curriculum to determine areas where efficiencies can be affected.*

> **Recommendation:** *Overall the campus has a broader set of curricula than it can currently support and needs to refine and tighten course selection. Majors and minors with low enrollment or historically low graduation rates should be evaluated for continuation, consolidation, or elimination.*

> **Recommendation:** *Overall the campus needs to set an ideal class size for class types (lower division and upper division University Studies, Major) and begin to develop evaluation procedures that address practice against those norms. In order to maintain manageable class sizes and close faculty/student interactions, adjustments will be required in the overall curriculum.*

## 4. Staffing

Five year trends in the three employment categories follow.

    a.  Faculty:  For Fall, 2011, Faculty Headcount is 235 (FTE 222), an increase of 34 (30FTE) over Fall, 2007 Headcount of 201 (192 FTE), a 17% increase.

        Approximately 34 FTE of faculty positions are used for non-instructional purposes.

        For Fall, 2011, Tenured/Tenured Track Faculty Headcount is 168 (163 (FTE) over Fall, 2007 Headcount of 144 (141 FTE), a 16% increase.

        For Fall, 20ll Non-Tenure Track Headcount is 67 (58 FTE) over Fall, 2007 Headcount of 57 (51 FTE), a 14% increase.

    b.  Classified Staff:  For Fall, 2011, Classified Staff Headcount is 203 (191 FTE) and increase of 8 over Fall, 2007 Headcount of 195 (182 FTE), a 4% increase.

    c.  Unclassified Staff:  For Fall, 2011, Unclassified Staff Headcount is 188 (178 FTE), a decrease of 23 over Fall, 2007 Headcount of 213 (198 FTE), an 11% decrease.

Enrollment during the years 2007-2012 increased by 18% in headcount of 835 students (excluding Advanced Southern Credit) from 4,630 in 2007 to 5,465 in 2012.  If a comparison is made between enrollment in 2003 and 2012, years which had similar enrollments of 5,351 and 5,465 respectively, the changes in staffing are:  faculty, 30 headcount (34 FTE)increase; classified staff, an increase of 3 headcount (4 FTE) and; unclassified staff,  a decrease of 32 headcount (21 FTE).  Recent reductions in staffing for budget reductions have resulted in an additional decrease of 2 classified, 6 unclassified, and 11 faculty headcount.  While faculty staffing has kept pace with enrollment growth over the past five years, other staffing has remained flat or been reduced.  Current faculty staffing exceeds a similar enrollment pattern in 2003 by 30 FTE primarily as a result of new program development.

Focus group results demonstrate that there is great anxiety in the staff, both classified and unclassified in the workload that results from repeated downsizing and in the difficulty doing work well.  Additionally there is a desire to better communicate and collaborate among all vice presidential units with consistent messages, expectations, and evaluations.  There is a desire to provide time and training for skill building and reward behavior that results in better performance.

> **Recommendation**: *It is no surprise that the university cannot continue to divest in staffing to meet budget challenges.  The campus needs to progressively plan to bring the curriculum in line with the mission, vision and goals that are being outlined in the various reports from planning and visioning groups that meet the needs of the current student body and region and plan to provide staffing in all areas that meet those curricular needs.*

**Students**

Our students are heavily first-generation with estimates as high as 61%.  In 2010-11, students that were eligible for federal  Pell grants (low income) were 43.4% of the undergraduate population(48.6% of Oregon undergraduates).   We have seen an increase of Federal Application For Student Assistance (FAFSA) filers from 2010 to 2012 from 3,045 in 2009 to 4,635 in 2011, a 17.5% increase. Financial Aid (grants, loans, work study) has increased from $41,444,229 in 2008-2009 to $49,602,63 in 2011-2012, an increase of $8,158,403 or 20%.  During the same years, tuition and fees for resident undergraduate students increased by $1,497 from $5,718 to $7,215 or 6.18%.

Retention rates for first-time full time freshmen increased steadily from 62% in 2006 to 70.5% in 2010 and then slipped to 69.3% in Fall, 2011.  Sophomore transfers from 2010-2011 retain at 75%, Junior transfers at 82.5%, for an average transfer rate for all undergraduates of 74%.

Transfers from Oregon Community colleges have increased from 193 in 2006 to 384 (99%) in 2011.  Similarly, transfers from participating community colleges in California (College of the Siskiyous, College of the Redwoods, Shasta College) have increased from 37 in 2006 to 58 in 2011.

Six year graduation rates for First-time Full-time Freshmen slipped from a high of 40% for the 1999 cohort to a low of 31.3% for the 2003 and 2004 cohorts, improving to 33% for the 2005 cohort.  When looking at OUS rates for students that started at SOU and transferred to another OUS institution, for the 2005 cohort, the rate improves to 46%

Six year graduation rates for transfer students have improved steadily from 46.7% for the 1999 cohort to 52% for the 2005 cohort (hitting a low for the 2003 cohort of 41.8%).

Other factors that affect student persistence and completion are:
- Average debt carried by graduates increased from $21,334 in 2005-2006 to $28,907 in 2010-2011 with the number of graduates with debt staying steady for these years at 72%.
- Students with self identified disabilities have increased from 245 in 2005-06 to 382 in 2010-11 a 56% increase.
- Medical Withdrawals have increased by 50% from 21 to 42 in the three years 2009-10 to 2011-12.  Similarly Mental Health Counselor Appointments have increased 33% during the same time period.
- Students who participate in intercollegiate athletic programs retain at a five percent higher rate than other students.
- Students who live in University housing retain at a five percent higher rate than students who do not live on campus .
- Students from California retain at a five percent higher rate than the SOU average.

> **Recommendation:**  *We are performing below expectations in both retention and completion.  Since these elements are part of the future state funding formula, we need to align staffing and resources to improve rates in both of these areas.*

## Report Summary

This study presents a variety of data for consideration, but several themes have evolved as well:

- We cannot grow our way out of our fiscal issues with our current enrollment mix. If we continue as we have in the past five years, the gap between resources and expenses only deepens. We will need to reduce expenses drastically, consider a different enrollment mix that generates more revenue per student FTE, or a mixture of both.
- We have enough space to accommodate growth for the foreseeable future if we use our current space more effectively.
- We have a curriculum that is too diverse for our current and near future student body. Tightening all aspects of the curriculum could lead to better use of scarce resources. Given the reductions in state support and a limited ability to raise tuition, we may not be able to maintain current class size ratios. Innovations in technology and pedagogy could help us achieve better outcomes more effectively. We should embrace and incent documented best practices that promote learning and retention.
- We have a student body that is very heterogeneous and has competing needs and interests. Designing services that challenge the more academically talented with those that need extensive tutoring and other assistance is unachievable given our current fiscal and human resources.
- We expend the equivalent 30 FTE on faculty release time for administrative duties (chairs, directors, coordinators, etc). Perhaps there is a more effective and efficient way to organize our academic programs.
- Retention and Completion are two areas that need to be addressed immediately as the state is moving to funding based on student completion rather than student participation.
- Our staff, while dedicated, is at a tipping point. With the reduction of staff and increase of students, our staff is fatigued and demoralized. We should work to create structures that allow staffing commensurate with the needs of our students and community

It is our hope that the committees that are considering "transformative change" consider this data and its conclusions in their deliberations.

# Scenarios for the SOU Capacity Study

The Modeling Tool:

The Office of Institutional Research developed a modeling tool for building scenarios to provide context for the SOU capacity study. The model uses dynamic values for a variety of independent variables such as enrollment growth and/or decline, overall tuition rate changes, and expectations for state appropriations. The model then calculates the impact these assumptions will have on revenues, expenses, employee resources, and student enrollment projected over a ten year time period.

The Variables:

To get as accurate a set of projections as possible the revenue streams were broken into fine detail on both the state appropriation categories and the tuition categories. The state appropriations in this model are calculated by looking at RAM cell values only and exclude enrollment incentives and other non-enrollment driven funds. Recall that RAM funding values are separated into upper and lower division UG course work versus GR course work and then each of those categories are broken into subject matter disciplines as defined by the classification of instructional programs or CIP codes. Tuition revenue is separated into categories such as WUE, UG & GR residents, UG & GR non-residents, UG & GR online courses, School of Education differential tuition programs, tuition from staff enrollments, and revenue from fee based courses.

Scenario Data:

During the data gathering phase of the study, dozens of scenarios were generated for review by a task force and three were chosen for inclusion in this Capacity Study report; 1) Zero Growth with Continued Disinvestment scenario, 2) Modest Growth with Stagnant Appropriations scenario, and 3) Leveraging Grads with Stagnant Appropriations scenario. All three scenarios start with enrollment and financial data sets taken from the base year of 2011-2012 (FY 12 and AY 11/12).

Assumptions Common to All Scenarios:

All three scenarios have the following assumptions in common:

- tuition rates will increase by 9.9% in year one, 5% in year two and year three, and a 3% increase for year four through year ten,
- labor rates will increase by 4% per year for the next ten years, and
- the consumer price index (CPI) will increase by 2% per year for the next ten years.

An executive summary of the impacts generated by each of the three scenarios is included below.

## Scenario 1 - Zero Growth and Continued Disinvestment

### Assumptions:
*Common assumptions to all scenarios:*
- *tuition rates will increase by 9.9% in year one, 5% in year two and year three, and a 3% increase for year four through year ten,*
- *labor rates will increase by 4% per year for the next ten years, and*
- *the consumer price index (CPI) will increase by 2% per year for the next ten years.*

Additional assumptions for this scenario:
- enrollment growth in all student categories will remain unchanged from the base year over the next 10 years, and
- state appropriation will not change in the first year and then will decrease by 5% per year for the next 9 years.

**Impacts:**
Financial
- In AY 16/17 (year 5)
    o Total tuition revenue increases $9 million over AY 11/12 (base year)
    o Total state appropriation decreases by $1.3 million over AY 11/12 (base year)
    o Total expense of labor and S&S increase by $7.7 million over AY 11/12 (base year)
- In AY 21/22 (year 10)
    o Total tuition revenue increases $15.5 million over AY 11/12 (base year)
    o Total state appropriation decreases by $2.9 million over AY 11/12 (base year)
    o Total expense of labor and S&S increase by $17 million over AY 11/12 (base year)

    In year 5 the projection for the net of tuition and state appropriation revenue is $7.7 million but this is completely offset by a projected $7.7 million increase in expenses for labor and S&S. By year 10 this becomes more pronounced and a $4.4 million shortfall between revenue and expenses is projected.

Enrollment
- In AY 16/17 (year 5)
    o Enrollments remain unchanged due to the scenarios assumption of zero enrollment growth
    o Headcount is 6855 and FTE is 4822
- In AY 21/22 (year 10)
    o Same as above; headcount is 6855 and FTE is 4822

Workforce
- In AY 16/17 (year 5)
    o Workforce remains unchanged
    o Headcount is 741 and FTE is 624.4
- In AY 21/22 (year 10)
    o Same as above; headcount is 741 and FTE is 624.4

## Scenario 2 - Modest Growth and Stagnant Appropriations

**Assumptions:**
*Common assumptions to all scenarios:*
- *tuition rates will increase by 9.9% in year one, 5% in year two and year three, and a 3% increase for year four through year ten,*
- *labor rates will increase by 4% per year for the next ten years, and*
- *the consumer price index (CPI) will increase by 2% per year for the next ten years.*

Additional assumptions for this scenario:
- enrollment growth in all student categories increases by 2% per year for the next 10 years, and
- state appropriations will remain unchanged from the base year over the next 10 years.

**Impacts**:

<u>Financial</u>
- In AY 16/17 (year 5)
  - o Total tuition revenue increases $9.4 million over AY 11/12 (base year)
  - o Total state appropriation increases by $0.5 million over AY 11/12 (base year)
  - o Total expense of labor and S&S increase by $10.3 million over AY 11/12 (base year)
- In AY 21/22 (year 10)
  - o Total tuition revenue increases $21.9 million over AY 11/12 (base year)
  - o Total state appropriation increases $1.5 million over AY 11/12 (base year)
  - o Total expense of labor and S&S increase by $29.3 million over AY 11/12 (base year)

Revenue increases from the constant 2% enrollment growth coupled with tuition increases and a small corresponding increase in state appropriation due to the increased SCH are completely consumed by the large increase in labor and S&S expense illustrating how SOU can't "grow our way out of" these financial problems.

<u>Enrollment</u>
- In AY 16/17 (year 5)
  - o Enrollments increased across all categories per the assumptions of this scenario
  - o Headcount is 7421 (8.3% increase) and FTE is 5324 (10.4% increase) over AY 11/12 (base year)
- In AY 21/22 (year 10)
  - o Enrollments increased across all categories per the assumptions of this scenario
  - o Headcount is 8034 (17.2% increase) and FTE is 5878 (21.9% increase) over AY 11/12 (base year)

<u>Workforce</u>
- In AY 16/17 (year 5)
  - o Workforce increases dramatically as their numbers are predicated on enrollment size
  - o Headcount reaches 818 and FTE climbs to 689.4, increases of 10.4% over AY 11/12 (base year)
- In AY 21/22 (year 10)
  - o Headcount increases to 903 and FTE increases to 761.1, an upward change of 21.9% over AY 11/12 (base year)
  - o Large workforce numbers and their increase in labor cost offset revenue gains from enrollment growth

**Scenario 3 - Leveraging Grads and Stagnant Appropriation**

**Assumptions:**

*Common assumptions to all scenarios:*
- *tuition rates will increase by 9.9% in year one, 5% in year two and year three, and a 3% increase for year four through year ten,*
- *labor rates will increase by 4% per year for the next ten years, and*
- *the consumer price index (CPI) will increase by 2% per year for the next ten years.*

Additional assumptions for this scenario:
- enrollment growth will change so that the ratio of UG to GR SCH will result in a 80/20 split by the end of the tenth year and accomplished by a decrease of 3% per year in all undergraduate student categories and increases by 30% in graduate categories, and
- state appropriations will remain unchanged from the base year over the next 10 years.

**Impacts**:

Financial
- In AY 16/17 (year 5)
  - o Total tuition revenue increases $10.1 million over AY 11/12 (base year)
  - o Total state appropriation is unchanged over AY 11/12 (base year)
  - o Total expense of labor and S&S increase $7.2 million over AY 11/12 (base year)
- In AY 21/22 (year 10)
  - o Total tuition revenue increases $23.5 million over AY 11/12 (base year)
  - o Total state appropriation increases $0.5 million over AY 11/12 (base year)
  - o Total expense of labor and S&S increase $18.8 million over AY 11/12 (base year)

This scenario grows enrollment revenue much faster than the increases in labor and S&S expense. Both year 5 and year 10 revenues when compared to labor and S&S expense result in cushions of nearly $3 million and $5.2 million respectively. This scenario's assumption to shift student populations from undergrad to grad therefore takes advantage of the larger tuition and state appropriations received for graduate students.

Total student body enrollment s drop from year one through year seven and this keeps workforce expenses down and the overall result is better leveraging of the overall mix of the student body. To achieve the 80/20 UG to GR ratio all undergraduate enrollment categories have been reduced by 3% per year for ten years while the graduate enrollment categories are increased by 30% per year. These changes achieve a 90/10 split by year five and at that time the financial projection is quite attractive. By year five enrollment revenue increases by 25% and the size of the student body actually drops by 1% when compared to the base year. By year ten the enrollment revenue increases by 60% over base year while total student enrollment increases by only 2.6%. It seems clear that strategizing to achieve this higher ratio of graduate students will allow SOU to achieve financial stability and serious financial growth.

<u>Enrollment</u>
- In AY 16/17 (year 5)
    o A 90/10 split of UG to GR is realized by radical increases in grad students and mild decreases undergrads
    o Total headcount actually drops by 62 and FTE drops by 52
- In AY 21/22 (year 10)
    o An 80/20 split of UG to GR is nearly realized by AY 21/22 as a result of the constant increase in graduate student counts while decreasing undergraduate students.
    o Total headcount is projected to rise by 175 while FTE increases to 154 compared to AY 11/12 (base year)

Clearly there are other combinations of growth and contraction to use in achieving a 90/10 and 80/20 split.  However, in practice, it  may be easier to eliminate a few undergraduate programs and their students while increasing enrollment in the current grad programs, or establish new ones, than it is to hold constant the number of undergrads while trying to implement the large increases in grad students to arrive at the desired ratios.

<u>Workforce</u>
- In AY 16/17 (year 5)
    o Employee headcount drops by 8 and FTE by 7.0 when compared to AY 11/12 (base year)
    o Small decrease in student enrollment drives a small decrease in workforce
- In AY 21/22 (year 10)
    o Employee headcount increases to 765 and 644.3 FTE compared to AY 11/12 (base year)
    o Small increase in student enrollment necessitates a small increase in workforce

 It should be noted that with more graduate programs on campus and the understanding that graduate level courses should likely carry smaller faculty to student ratios the number of faculty (both headcount and FTE) might be adjusted upwardly to accommodate the increase in graduate courses taught.  Non-faculty employee numbers do not need to be adjusted since providing student services to a graduate student essentially requires no more effort than to an undergraduate student, in fact one might argue that it requires less.

# Academic Support Prioritization Report

5-1-2013

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# Introduction

The prioritization process represents what we hope will be the beginning of regular and ongoing assessment of our work supporting student success, intellectual growth, and responsible global citizenship. Achieving distinctiveness requires intentional decision-making supported by qualitative and quantitative measures. Although the ongoing disinvestment in public higher education is a significant challenge, it does not excuse the fact that our costs and tuition increases are on an unsustainable trajectory. Our stewardship of both public funds and student tuition means we must always be assessing what works, what does not, and what programs or efforts should ultimately be adjusted. Financial pressure aside, these efforts are even more important as we are accountable to our students, their families, and the public to ensure that we are achieving the mission of this institution.

# Prioritization Guiding Principles

"The process will be fair, honest, forthright, and responsible. It will follow the best examples of development and implementation undertaken by other universities throughout the nation.

The process shall be open and transparent, with no a priori decisions having been made, and with decisions made based on the published criteria.

In order to set realistic priorities, it will be necessary to rank all programs, academic and non-academic, by quintiles.

The process will offer the opportunity for enrichment of programs, as well as the possibility of contraction or elimination.

- We will embrace a culture of evidence, one that ensures that program decisions now and in the future will be data-driven.
- To enable better decisions in the future, the large database established for prioritization will be maintained going forward.
- Transparent: The study criteria will be collaboratively developed, approved, and well-publicized in advance of the study.
- Comprehensive: The study criteria will be broad in scope so as to encompass all aspects of a program.
- Consistent: The same study criteria will be applied to each program; only their measurement may change as appropriate.
- Inclusive: All university programs - instructional, student service, and administrative will be analyzed, and all university employees will have the opportunity to participate in the analysis of their programs.
- Demand-driven: The study will measure the demand for all programs as determined by students, employers, or internal constituents.
- Data-based: The study will be based on both quantitative and qualitative data.

# Decision Making

Both the Academic and Academic Support PPGs will use the following decision making criteria.

Quorum: 7 out of 9 members must be present either in person or via phone or other digital conferencing method to conduct any formal meeting.

Voting:

- Any decision requiring a formal vote requires all (9) PPG member votes.
- All formal votes will require a criteria of consensus - 1 which is equivalent to 8/9ths
- If the group cannot reach the 8/9ths level of support, the decision will be tabled until the next official meeting. At that time, if the group still cannot meet the 8/9ths criteria, a fall back criteria of 7/9ths will be implemented for that particular decision.
- For all decisions about placing programs in quintiles, any department/program that does not receive at least 7/9ths support for placement in the top four quintiles will, by default, be placed into the bottom quintile."

# Process

Every program report was individually reviewed and scored by the members of the Academic Support Prioritization group. Programs were scored on six criteria: purpose and impact (19 points), internal demand (19 points), external demand (19 points), quality (19 points), financial analysis (19 points) and opportunity analysis (5 points). The maximum possible score for a program was 100 points.

The program scores assigned by individual reviewers were compared, examined, and discussed among the group to develop the initial ranking of each program. Program rankings were confirmed or adjusted by full votes of the prioritization group and each program was voted on multiple times across multiple sessions.

# Quintile Definitions

1: Programs in this quintile appear to be **highly effective and serving the SOU mission especially well** or have the potential to be **key differentiators** for SOU. They are the strongest candidates for enhancement or investment of resources.

2: Programs in this quintile appear to be **very effective and serving the SOU mission**. They should be considered for further investment, but at least maintained at their current levels.

3: Programs in this quintile appear to be **generally effective and connected to the SOU mission**. These programs should be maintained at the current level.

4: Programs in this quintile appear to be **less effective in assessing or benchmarking demand, quality or connection to the SOU missio**n, and/or they present fiscal issues. These are programs for which the

university should consider reorganization, streamlining processes, outsourcing some services, or retaining program at a lower level of support.

5: Programs in this quintile appear to be the **least effective at assessing or benchmarking demand, quality or connection to the SOU mission**, and/or they present the most serious fiscal issues. These are candidates for further assessment, consolidation, reduction, restructuring, sunset, or outsourcing.

## Program Rankings Explained

**Program rankings are relative to other programs and not a grade. Each quintile contains 32 programs, for a total of 160 academic support programs. The rankings are based primarily on the retrospective information presented in the program reviews. Incomplete or poor responses resulted in lower ratings.**

## Program Rankings by Department

**Academic Advising and Support**

Academic Advising: (Quintile 2) Essential for student success, but limited assessment of quality. Demand is high and additional resources may increase access and availability for students. Developing quality measures and plans for assessment will help.

First Year Mentoring Program (Student Success): (Quintile 3) Strong start to the program, but effectiveness may be impacted as the program transitions to employing students as program coordinators.

Veteran Services and Benefits: (Quintile 3) Serves a high need, but small segment of students. Displays a deep knowledge of the student population it serves and how to effectively assist them.

Accelerated Baccalaureate: (Quintile 1) A potentially distinctive offering for the university. The university should strongly consider the recommendation in the program's opportunity analysis to fold this program into Admissions and the Enrollment Services Center.

**Admissions**

Operations: (Quintile 4) Measures of quality and effectiveness are sparse. Operations consumes nearly 60% of the total Admissions budget. Additional streamlining of the admissions process could be a significant opportunity to shift resources to outreach.

Outreach: (Quintile 1) An essential function of the university. An efficiently run program, but measures of effectiveness could be clearer for some efforts (e.g. annual trip to Hawaii).

**Amistad Program:** (Quintile 5) Significant past success at fostering connection between SOU and University of Guanajuato, but little ongoing participation. Unclear if this is now a relationship or a program.

**Athletics:** The financial stability of athletics needs to be addressed due to an ongoing structural deficit, a reliance on unstable funding sources (i.e. lottery) transfers from housing, and dependence on student fees.

Administration: (Quintile 2) Shows passion for providing meaningful experiences for student athletes. Does not address long term funding stability of athletics programs.

Athletic Trainers: (Quintile 4) Collaboration with Morinomiya College shows entrepreneurship and a novel way to support this program and student athletes. Athletic Training Education Program seems to be an opportunity worth investigating.

Cheerleading: (Quintile 5) Very low cost. Current team members seem highly motivated and pay out of their own pocket to purchase uniforms. No articulated measures of quality or total student participation. Potentially a club sport instead.

Men's and Women's Cross Country: (Quintile 4) Lowest cost per student served of all team sports. Detailed indicators of athletic achievements, but no information regarding academic success or community service involvement. Potential to connect with local community of outdoor and long distance runners.

Women's Basketball: (Quintile 4) High cost relative to the number of students served. Few quality measures reported. Well-articulated vision that would dramatically affect athletic programs and the university, but requires university-wide discussion and support.

Men's Basketball: (Quintile 5) High cost relative to the number of students served. External interest increasing, but fundraising is lower than other less popular activities.

Fitness/Rec Center: (Quintile 4) Provides good example of usage tracking and ongoing evaluation of equipment and facility. Shows stewardship by adjusting current activities to align itself with new recreation center building plans.

Football: (Quintile 4) High cost, but serves the largest number of student athletes. Highly visible program both on and off-campus. Program appears to be on a good trajectory since coaching change.

Softball: (Quintile 5) High cost relative to the number of students served. Many indicators of strong and growing community involvement. Competition limited by travel costs. Strong external fundraising.

Women's Soccer: (Quintile 4) Cost per student served approximately in the middle of all team sports. Strong focus on recruitment and fundraising efforts.

Sport Camps: (Quintile 4) Great opportunity for athletic teams, students, and coaches for fundraising and summer employment. Despite competition with other university-based camps, there may be an opportunity to expand these operations. A centralized Events department or partnership with Youth Programs could help coordinate, market, and handle some of the administrative tasks of running these camps.

Sports Information: (Quintile 5) Primarily serves external stakeholders of athletics. Non-essential program that has not built collaborative relationships with other non-Athletic programs, including Marketing. Raises awareness of athletics in the community and may impact attendance at events.

Men's and Women's Track and Field: (Quintile 4) Cost effective for the number of students served. Competition limited by travel costs. No articulation of how program impacts the university mission and vision, except participation.

Volleyball: (Quintile 3) High cost relative to the number of students served. Initiated many entrepreneurial efforts to support the program, including a summer camp and a local tournament. Opportunity for adding sand volleyball should be examined.

Wrestling: (Quintile 4) Cost effective for the number of students served. Recruitment potential high due to limited number of other collegiate-level competitors in our region. Strong leveraging of external support for financial support.

**Bookstore**

Brand and logo: (Quintile 2) Important for spirit, identity, and community. A growing part of bookstore sales.

General merchandise: (Quintile 3) Good source for course supplies. Better marketing may increase sales.

Technology: (Quintile 2) Responsible for twenty percent of all bookstore sales, but is unprofitable due to very low margins on technology sales. Relationship with Apple brings SOU some status and opportunities. Consider eliminating the assessment (treat as a service area) or this program.

Textbooks: (Quintile 1) Responsive to broader changes in textbook market through efforts such as textbook rental and e-textbook availability. The campus would benefit from a digital strategy for future course materials.

**Budget Office**

Planning and Forecasting: (Quintile 4) An important function, but focused on deadlines and reporting requirements instead of effectiveness. Operations of this program have been severely curtailed due to short staffing. This program is in need of reinvention and a shift to more automation.

Position Control: (Quintile 5) A highly complex and manual process that may not be managed by the appropriate office. This program is in need of reinvention. Other programs may need to take on some or all of the responsibilities of position control.

**Business Services**

Accounting and Reporting: (Quintile 2) Accuracy and audit compliance is high, but few efforts to engage stakeholders and improve accounting practices in departments. Many opportunities for automation and self-service available and should be explored.

Bursar and Accounts Receivable: (Quintile 4) Essential, but overwhelmed department. Quality measures focus on accuracy, but do not evaluate service. Opportunities to simplify student billing and move to electronic bills should be investigated.

Collections: (Quintile 2) Growing need for this program, but limited resources prevent it from being more proactive. According to opportunity analysis, investment in this program to increase outreach and provide more billing options to students could decrease referrals to collection agencies while increasing revenue.

Payroll: (Quintile 2) A critical, but highly manual process. The relationship between the Budget Office regarding position control should be examined. Improved collaboration with the Enrollment Service Center and Human Resources (benefits) could improve service and avoid unnecessary issues. Payroll automation would highly benefit this program and the university.

Printing and Copy Services: (Quintile 5) Self-supporting, but unclear that the program would break even if currently vacant positions are filled. Opportunity to outsource or combine operations with other programs like campus mail services or student publicity center should be examined.

Purchasing/Travel: (Quintile 4) Effective oversight of purchasing cards and measurably quick turnaround for travel reimbursements. Additional outreach could help educate stakeholders about services and discounts available for official travel. Automation could improve both purchasing and travel operations.

**Campus Public Safety**

Parking: (Quintile 5) This program, despite being an auxiliary, is not currently self-supporting. There are no benchmarks or measures of effectiveness. Although new software promises to improve operations, significant changes in this program are likely still needed to bring it to self-sufficiency.

Safety: (Quintile 1) A critical function for the campus, it would benefit from additional investment in staffing, technology, and space. Safety helps mitigate significant risks and liabilities for the university.

**Career Development Services: (Quintile 3)** A new program, but early indications suggest it is fulfilling an important role for students.

**Center for Instructional Support: (Quintile 3)** Program undergoing significant change with merger of Distance Education and Center for Teaching and Learning. No quality measures or benchmarks reported. Single-most important accomplishment was migration to Moodle.

**College of Arts and Sciences**

Administration: (Quintile 2) Many quality measures articulated, but no data provided. Program has successfully centralized and transformed many activities including budgeting and room and equipment upgrades. Provides effective management and oversight of the College.

Chamber Music Concerts: (Quintile 4) Principally serves an external audience with few student participants. Fiscally stable, but must seek ways to strengthen connection with SOU.

Facility Rentals (camps, pool, etc.): (Quintile 5) No report submitted.

Music Department Hosted Festivals: (Quintile 5) Not financially self-sustaining. No quality measures. No measures of recruitment value. Lack of campus visibility. This program could potentially be assigned to a centralized Events department or Youth Programs.

Schneider Museum of Art: (Quintile 5) Growing community support, but not well connected to the mission or vision of the university. Should either become self-supporting, perhaps requiring a seed investment, or should develop a vision to become an integral part of the student experience.

Shakespeare Studies Visiting Groups: (Quintile 5) Self-supporting, but possibility exists to increase outreach and participation. Structure and mandate of the program should be reviewed by current OUS legal staff to determine what, if any, changes can be made.

**Collegiate Recovery (CORE):** (Quintile 1) This program, although currently small, offers a significant opportunity for institutional distinctiveness. SOU would be the only university on the West Coast offering a residential program for students in recovery. The program should either receive investment or alternative funding methods found.

**Community Preschool at SOU:** (Quintile 5) Provides a venue for practicum experience for SOU students, but otherwise does not impact the mission and vision of the university. Serves a small number of families and enrollment has declined due to competition from other preschools.

**Continuing Education**

Advanced Southern Credit Administration: (Quintile 1) Adds headcount for the university and builds an important relationship between local high schools and SOU. Income from the program directly supports many academic programs and contributes to the university general fund.

OLLI: (Quintile 3) This program serves a growing segment of the population not served by the other programs of the university. Not only self-supporting, it also adds a small amount of headcount and tuition revenue. The challenge for this program is how to foster greater integration with the university (i.e. it is located on the periphery of the campus both physically and psychologically).

Programs for Adults: (Quintile 2) A self-supporting program that operates with minimal staffing. It provides an important service, but has limited connection to the university. With investment, this program could offer more opportunities to connect academic programs with non-degree seeking adults and to expand non-credit offerings to a large untapped market.

Youth Residential Camps, Classes, and Activities: (Quintile 2) A self-supporting program that provides great outreach opportunities and has opportunity for growth. Could strengthen its tie to the core mission. Central Events department could support this area.

**Development/Foundation**

Alumni Office: (Quintile 4) Low visibility on campus. Alumni seem to be an untapped resource for the university. Recent efforts seem to be increasing outreach and visibility, but it will take years of sustained effort to show significant progress. This program could benefit from having access to a central Events department.

Development Office: (Quintile 1) An essential office for the university, especially as state investment continues to decline. Significant success in scholarship fund-raising, but much less success in other areas of support for the university. More detailed reporting to the campus could alleviate concerns about quality and effectiveness.

Finance and Admin: (Quintile 2) Effectively manages the funds and information systems of the development/foundation office. Efforts to update their processes and systems should continue. No benchmarks comparing itself to similarly-sized universities.

SOU Foundation affiliates: (Quintile 5) No analysis of trade-off between work performed on behalf of affiliates and the work that could be performed instead directly for the university. Benefits to affiliated programs not clearly articulated.

**Disability Resources**

Disability Services: (Quintile 1) A mandated function, it serves the SOU mission and vision by providing equal access for all students regardless of disability. Multiple and ongoing efforts to not only control costs, but improve services to students.

University Coaching and Academic Mentoring: (Quintile 3) Financially self-supporting, but current staffing model is problematic; need to move toward permanent staffing. Provides important function that demonstrably improves retention and relieves demand on disability services.

**Enrollment Services Center**

Commencement: (Quintile 2) A required function and an important celebration of the university. Financial information is incomplete and no assessments of quality are made. Many recent efforts to improve event and reduce costs. This program should be given a stable budget and assigned staff. Responsibility for commencement could be assigned to a centralized Events department and/or student employees; could represent an opportunity to connect with the local community and businesses with sponsorships.

Financial Aid Office: (Quintile 1) An essential function with very high and growing demand. Quality measures focused on compliance and accuracy, but no evaluation of student satisfaction. Opportunities to further automate financial aid functions and develop a comprehensive financial literacy education function should be considered.

Front office operations (ESAs): (Quintile 3) Serve important customer interface role for the enrollment service center, but current physical space and layout does not serve students well. Current workload should be examined to determine what could be automated and what processes could be improved across the university to reduce student issues and confusion.

Production and Support: (Quintile 3) Provides important support for all functions of the enrollment service center and admissions office. Quality measures should include qualitative assessment and measures of overall effectiveness.

Registration and Records: (Quintile 1) Essential program that directly impacts every student and faculty member. Many quality improvement projects underway, but mechanisms to assess impact upon completion should be implemented.

**Facilities Management and Planning:** Current model of Facilities Management and Planning chargebacks should be re-examined; determine what services are charged back and what should be centrally funded.

Building Maintenance: (Quintile 2) Compares favorably with other OUS institutions, but few articulated goals. Ongoing quality improvement and cost reduction efforts include recent merger with housing. Good use of deferred maintenance funds to address long term needs of the campus.

Campus Mail Services: (Quintile 4) Responsive to campus needs and demonstrates a commitment to providing excellent mail service. Actively works to reduce costs for other departments. Opportunity to merge functions with Print and Copy Services should be examined.

Custodial Services: (Quintile 3) Effective for cost and size of staff, but few measures of customer satisfaction. Demonstrates commitment to sustainability with green product purchases and usage. Consideration should be given to adding student cleaning staff. Adding or shifting custodial support to some daytime hours should be also evaluated.

Environmental Health and Safety: (Quintile 3) A reinvented program that is proactively engaging the campus and saving money, directly and indirectly, for the university.

Landscape Services: (Quintile 2)  Appearance of the campus has a significant impact on prospective students, campus visitors, and community opinion of the university. Supports a large campus footprint with minimal staffing. Lack of quality assessment information, but program acknowledges not meeting the expectations of the campus. Adding funding to support a student landscape crew could have a significant positive impact and should be considered.

Lock Shop: (Quintile 5) Added responsibility for family housing and residence halls with no addition of staff. Minimal assessment of quality and no goals or benchmarks. No ongoing efforts to audit key or fob access. Suggestion to in-source alarm and building monitored should be investigated.

Motor Pool: (Quintile 5) Non-essential service, although frequently used by select departments. No mention of total number of vehicles currently in motor pool. No internal marketing and little awareness for this service.

Planning (capital repair and improvement projects): (Quintile 3) Demonstrated cost savings on capital projects by providing this service internally, but no goals or benchmarks for the program. Unclear future for position, if or when capital spending slows.

Support Services (admin, accounting, FAMIS): (Quintile 5) Added workload from merger with Housing maintenance without increasing costs or staffing. No current efforts underway to improve quality of services and quality assessment is driven by complaints. Opportunities to automate processes, revise and simplify billing, and reduce duplicative work should be examined.

Sustainability: (Quintile 1) Supports the university's goal of sustainability. New, but active program that shows tracking of its accomplishments and assessment of ongoing work. Tenuous connection to the Medford campus. Should deepen collaboration with ECOS.

Utilities: (Quintile 3) Critical to the operation of the university. Shows effort to improve service, reduce costs, and lower energy consumption. Effective level of staffing.

**Finance and Administration Office**

Administrative Functions for the Office: (Quintile 5) This office provides effective oversight of institutional budget and support our financial reserves. However, the report provided minimal information, few quality measures, no benchmarking, and does not reflect accomplishments of division.

Contracting: (Quintile 5) Little insight into program provided; no analysis of quality, demand, or functions. Unclear if contract with Portland State University is effectively meeting the needs of the university.

Risk Management: (Quintile 4) Mandated function by Oregon University System, but role seems inappropriate for the Vice President for Finance and Administration. Little insight into how risk management currently functions or should function.

**Grants and Sponsored Programs**

Grants and Sponsored Programs: (Quintile 3) Important resource that supports faculty research efforts and brings in external funding. Demand has remained relatively constant, but this may be due to lack of additional capacity in this program.

Institutional Animal Care and Use Committee (IACUC): (Quintile 5) Required function to continue performing any research by faculty and students that includes animals. Very low demand. Consider transferring these functions to the departments that conduct animal research.

Institutional Research Board (IRB): (Quintile 3) Required function to continue performing human subject related research by faculty and students. Moderate level of demand and staffing level is effective.

**Higher Education Center:** Long term vision and goals for our Medford campus must be set by the stakeholders of the university.

HEC building administration: (Quintile 2) A significant part of the relationship with Rogue Community College. The building provides an important presence in the region outside of Ashland, but lacks a vision for programming.

Outreach: (Quintile 4) Consistency and sustained effort is necessary to overcome university's reputation of lack of follow-through on community initiatives. Outreach efforts suffer from lack of integration across programs and across the campuses. An important program to build community support for SOU.

Student Services: (Quintile 2) Provides important services for Medford-based students. Suffers from inadequate resources and the need to provide all services to Medford students, which duplicates functions performed on the Ashland campus by multiple departments.

Testing Services: (Quintile 2) A well-managed and cost effective program that provides a useful service for both the university and the broader community. Not only self-supporting, it is a net financial contributor to SOU.

**Human Resource Services**

Benefits: (Quintile 3) Affects every employee of the university and demand is consistently very high. No measures of quality of satisfaction. Relationship between payroll and benefits programs should be examined. Resource constrained.

Hiring: (Quintile 3) A critical university function, but understaffed for demand. Some functions now left to departments and search committees. Not proactive. Process improvements and automation hampered by lack of resources; might best belong as part of a Business Center.

Labor Relations: (Quintile 3) Demand exceeds ability to provide service and program is consequently mostly reactive. Few quality measures and benchmarks. Resource constrained.

Training and Development: (Quintile 2) Resource constrained and may be unsustainable with current staffing level. Demand for employee training is very high.

**Information Technology**

Classroom and Media Services: (Quintile 1) Directly supports faculty and students. Examine usage of computer labs and classrooms.

Information Services: (Quintile 1) High demand and highly productive, but Banner can be frustrating to use.

Network Services: (Quintile 1) Efficient and effective program. Maintains essential services for running the university (network, wireless, telephones, and Internet access).

Switchboard operations: (Quintile 5) A well-managed, but non-essential service. Strong consideration should be given to either eliminating the switchboard or combining it with functions in another department.

Technology purchasing: (Quintile 1) Successfully demonstrated that aggregating technology purchasing leads to savings and efficiency. Centralizing printer and copier management should be considered not only for cost savings reasons, but sustainability reasons as well.

User Support and Help Desk: (Quintile 1) This program has undergone significant changes over the past two years. High satisfaction and a model for benchmarking and quality analysis. Explore creating internship opportunities.

**Institutional Research:** (Quintile 1) Fulfills important university need for better reporting to both internal and external stakeholders. Opportunity to align program with grants and research or institutional assessment should be considered.

**Interactive Marketing and Communications**

Branding and marketing: (Quintile 5) Little information about marketing efforts provided, no direct measures of quality, and no vision or plan for improvement.

Electronic communications: (Quintile 5) Highly important function, but quality measures are few. Program is not responsive to the current or anticipated needs of the university.

Graphics and publications: (Quintile 5) Important, but no articulation of goals, benchmarking or importance of gatekeeping graphic standards. Consider collaboration with Student Publicity Center.

Media Relations: (Quintile 5) No goals or benchmarks other than a vague assessment of positive or negative coverage. An important function for the university, but the current program needs significant attention.

**International Programs**

Education Abroad: (Quintile 2) Moderate level of demand and the number of SOU students studying abroad shows a slow but steady increase. Expansion of study abroad opportunities, the shift to direct exchanges, and the reinstitution of short term programs are significant accomplishments. Program could benefit from marketing help to increase internal campus awareness.

Intensive English Program: (Quintile 4) Contributes to the financial support of International Programs. Provides important opportunity for international students without requisite English skills to directly enter a degree-seeking program. Would benefit from marketing assistance.

International Student Services: (Quintile 1) Broadens the mission of the university by recruiting and support international students. Demonstrates effectiveness in operations and cost control. Growing body of international students is indicative of program's success. Needs marketing assistance.

National Student Exchange Program: (Quintile 5) A tiny, virtually unknown program in process of being reinvented after absorption by the Office of International Programs. Opportunity to leverage exchanges to improve student retention and attract students to SOU should be considered. Needs marketing assistance to increase program awareness.

**Jefferson Public Radio:** (Quintile 2) A well-known and well-regarded program, but disconnected from the university. New efforts underway to create deeper ties between JPR operations and our mission, but outcome remains uncertain.

**Learning Commons/Writing Center:** (Quintile 4) Fulfills an important need for tutoring and demand continues to grow. Program could benefit from dedicated management and oversight.

**Library:** Although the library has embraced new technologies and new approaches of reaching out to students and faculty, the operations of the library continue to be organized traditionally. Like the broader university, the library should examine and prioritize its own operations.

Access Services: (Quintile 2) Seems focused on managing access to the building and to physical media, even as demand shifts to electronic and online resources. The lack of an electronic reserves program seems to be a missed opportunity.

Administration: (Quintile 4) Event functions and room scheduling could be handled by a centralized Events department for the campus. Consideration should be given to allowing the DeBoer room to be scheduled centrally.

Collection Development: (Quintile 4) Demand for external electronic and online resources continues to grow significantly and there is unmet need from faculty and staff. The impact or importance of in-house electronic collections is unclear. Additional investment earmarked for expanding access to external electronic and online resources should be considered.

Government Publications: (Quintile 5) The emphasis for this program on creating additional dedicated physical space seems misplaced, since government publications have migrated almost exclusively online. Instructional material is important and relevant, but consideration should be given to whether this work could continue outside of a dedicated government publications program.

Instruction: (Quintile 2) Effective program that reaches many students and directly impacts the mission of the university. Expanded quality measures could help shape the program by surveying current deficiencies in student information literacy. Expanded course offerings should be considered.

Library Systems: (Quintile 5) Some functions seem redundant given other similar operations at the university, providing possible ways to collaborate and reduce costs.

Reference Services: (Quintile 2) Reference services has a vital role of providing research assistance to faculty and students, but may be distracted by other ancillary activities. Responsibility for laptop and iPad checkouts seems misplaced since other library programs, including access services and library systems, already manage similar work.

Technical Services: (Quintile 4) Unclear future for this program as physical cataloging and maintenance work has and will continue to decline.

**McNair Program:** (Quintile 1) Excellent quality and planning. Exemplifies the mission and vision of the university by serving traditionally under-represented students. Opportunity to establish parallel undergraduate research office for students not in McNair program should be investigated.

**Office of Student Affairs**

Administrative oversight: (Quintile 4) Significant changes in program activities and reduction in staffing levels after merger with Academic Affairs. Little historical detail regarding audience or number of students served. Program developing assessment criteria to gauge effectiveness.

Student conduct and community standards: (Quintile 1) Important resource for faculty and students. Adequately staffed and use of student conduct software shows positive impact of automation to improve effectiveness.

Student intervention and case management: (Quintile 1) High impact on student success and retention. Reorganization and re-engineering has induced a significant increase in demand and SOU Cares reporting. The most serious cases are referred to the student support network.

Student Support Network: (Quintile 1) Underwent significant changes as a response to a quality improvement survey. New practices and use of technology have allowed the program to handle more cases and intervene in every case presented this past year.

**President's Office**

Administration: (Quintile 2) Overseen significant changes and reorganization in administrative offices across the university. Ongoing attempts to improve campus communication. No mention of external or internal evaluation results themselves. Staffing is very lean compared to other universities.

Campus policies: (Quintile 4) Changes improved policy development and centralization, but little ongoing visibility or reporting to campus.

Community/external relations: (Quintile 1) A primary function of the office of the president. Few benchmarks and quality difficult to assess. An articulated strategic plan could help focus outreach efforts outside of the president's office. Very lean operation.

Government relations: (Quintile 2) Important program, but largely reactive. No goals or benchmarks stated. Minimally, but effectively staffed.

Leadership and strategic planning: (Quintile 1) Numerous strategic planning efforts underway. Little reporting on past successes and failures. Rotating special assistants to the president drawn from current staff and faculty could help address staffing issues.

**Provost Office**

Accreditation and assessment: (Quintile 1) A critical function, but this program is not effective in its current state of reduced staffing. Ongoing assessment is fundamental to achieving academic excellence.

Administration: (Quintile 3) Significant and ongoing change occurring with absorption of student affairs division. Few benchmarks on the quality or effectiveness of administrative staff, other than broad measures of overall institutional effectiveness. Options to streamline administrative functions and automate processes should be considered.

Campus Theme: (Quintile 4) Well-regarded, but volunteer staffing is unlikely to be sustainable. Besides attendance, additional quality measures and benchmarks are needed to evaluate effectiveness and engagement. Could be an opportunity to increase external awareness of the university and connect to the local community.

Curriculum and academic catalog: (Quintile 4) Essential function, although recent achievements and quality measures relate only to the actual production of the catalog. Curriculum change process should be reviewed and potentially revised.

Faculty Development: (Quintile 3) Ongoing faculty development is fundamental to the mission of the university, but this program lacks assessment and quality measures. Establishing clear accountability may create a more effective program. Additional investment could help differentiate the university.

Graduate Studies: (Quintile 3) Minimal cost and currently effective, but low graduate enrollment seems to be a missed opportunity for the university. Should consider creating new oversight for graduate programs.

Resource management: (Quintile 5) Lacks assessment of quality or effectiveness. As suggested by the program's opportunity analysis, shifting these functions to a business center may have "an enormous positive impact in quality of services."

**ROAR - Raider Orientation and Registration:** (Quintile 4) Constantly changing, but effectiveness suffers from neither being a program of Student Life nor Admissions. Current search for new Coordinator should provide much needed ownership of this program.

**Rogue Valley Community Television/Digital Media Center**

Academic Support: (Quintile 3) Has undergone significant changes to align itself with mission and vision. Few quality measures or benchmarks. Growing demand depends on maintaining access to current technology and software.

Community Access: (Quintile 4) Mandated program as a part of government access contracts. Few quality measurements or benchmarks. Demand for community access and viewership not measured. Opportunity to recover costs of community access programming operations and increase outreach should be explored. Support for broadcasting and streaming on-campus events should be considered.

Government Access: (Quintile 3) Provides financial support for other operations of the Digital Media Center/RVTV. Few quality measurements or benchmarks. Creates practical work and learning opportunities for students. Strong opportunity analysis, but financial dependence on government community access contracts could be a significant vulnerability.

**Schneider's Children Center**: (Quintile 5) Great quality, but no impact on the mission and vision of the university. Not cost effective when considering the number of student families served.

**Small Business Development Center:** (Quintile 2) Fits regional mission of the university and fosters ties to the community, but lacks student involvement. Expands usage of Higher Education Center and good fit for vision of Medford campus.

**SOU Laboratory of Anthropology (SOULA):** (Quintile 2) Embodies vision of SOU as an university that provides real world experiences to our students, but operational relationship with the rest of the university should be addressed (e.g. merge with SOURCE?)

**Southern Oregon Arts and Research**: (Quintile 2) Showcase for student work, but academic quality of event should be evaluated. Growing use of SOAR to raise external awareness and bring community to campus. Current staffing model unsustainable. Program coordination could potentially be assigned to a centralized Events department.

**Southern Oregon Research Center (SOURCE):** (Quintile 3) Financially self-sustaining. Promotes research activities at SOU and provides opportunities to students for practical work experience. Opportunities to support program growth and integration into the house experience should be considered.

**Student Health and Wellness Center**

Healthy Campus Initiative: (Quintile 5) Unclear why program exists outside of outreach and education. No measurable impact and no staffing to support program.

Medical Clinic: (Quintile 2) Financially self-sustaining through student fees and billable charges. Demand remains steady and the Medical Clinic continues to serve a large number of students for a range of medical issues. Effectively staffed and use of new electronic medical record system is streamlining operations.

Mental Health: (Quintile 1) Serves a significant and growing segment of the student body. Impacts student success and retention. Effectively staffed and use of new electronic medical record system is streamlining operations.

Outreach/Education: (Quintile 3) Growing audience and demand but limited quality measures. No assessment of outcomes.

**Student Life**

Civic Engagement and Sustainability: (Quintile 1) Broad range of programming that engages students both internally and externally.

Clubs and Organizations: (Quintile 3) Can have a significant impact on student experience. Quality standard appears to be highly accountable, but little data to suggest its use in practice.

Commuter Resource Center: (Quintile 3) Heavily used resource by specific groups of students. Unclear if students are attracted by programming or space. Opportunity for collaboration with Stevenson Union should be examined.

Diversity and Inclusion: (Quintile 2) Inclusivity is a core element of the SOU vision. Oversight and coordination of the resource centers is unclear. As explained in the opportunity analysis, some structural changes could have a positive impact on this program and the university.

Inter-Club Council: (Quintile 5) Strong assessment criteria established for clubs, but no data presented to indicate whether these assessments are used in practice. Functions could be assumed by other programs, such as student government or student life.

Multicultural Resource Center: (Quintile 4) Important to mission and vision, but unclear if meeting the needs of our students.  Just beginning to establish benchmarks and goals. Relationship to diversity and inclusion program undefined.

Outdoor programs: (Quintile 4) Program review incomplete and represents a missed opportunity, but many original ideas presented. Oversight appears incomplete and should be reconsidered.

Queer Resource Center: (Quintile 2) Visible and highly active. More accurate assessments of students served may bolster arguments for more resources. Relationship to diversity and inclusion program undefined.

Recreation- intramurals, club sports: (Quintile 3) Successful at student engagement, but facilities are inadequate. Better facilities could allow this program to be self-supporting.

Student Government Support and Student Fee Admin: (Quintile 4) A formal role for a staff advisor may improve the relationship between ASSOU and university administration. Such a role may also ease the annual transition between student administrations.

Student Publicity Center: (Quintile 3) Few quality measures, but many notable accomplishments. Serves need that would otherwise be unmet for student organizations.

SU building administration: (Quintile 1) Effective administration; demonstrated response to benchmarks and quality feedback. SU Event staff could form the core of broader Events department for the campus.

Women's Resource Center: (Quintile 3) Important resource available to students, but current focus appears narrow and may represent an opportunity for increased programming. Relationship to diversity and inclusion program undefined.

**Success at Southern:** (Quintile 3) Provides important opportunity for traditionally underrepresented students. Financially supported by federal TRIO grant. Strong mandated benchmarks and quality measures. Ongoing changes that began with Student Affairs reorganization last year.

**University Housing**

Conferences: (Quintile 1) Important for financial and outreach reasons. Significant opportunities for growth, but needs programming and promotional support.

Dining and vending: (Quintile 2) Vendor change has vastly improved quality. Current cost structure needs to be addressed; the university cannot subsidize financial losses in food service.

Family Housing: (Quintile 1) Fulfills an important need for students with families. Very high maintenance costs could affect the future viability of this program.

Residence Halls: (Quintile 1) Significant changes and improvements over the last few years. This program provides significant financial support to the university, especially athletics. Overall cost is a concern for students. Deferred maintenance is a concern for the ongoing viability of this program.

Residential Life: (Quintile 1) Provides community and builds spirit in the residence halls and helps improve the on-campus living experience. Significant cost savings measures adopted, with no reduction in program quality. On-campus living helps improve retention and student success.

## Program Rankings by Quintile

| Quintile 1 | |
|---|---|
| **Department Name** | **Program Name** |
| Accelerated Baccalaureate | Accelerated Baccalaureate |
| Admissions | Outreach |
| Bookstore | Textbooks |
| Campus Public Safety | Safety |
| Collegiate Recovery (CORE) | Collegiate Recovery |
| Continuing Education | Advanced Southern Credit Administration |
| Development/Foundation | Development Office |
| Disability Resources | Disability Services |
| Enrollment Services Center | Financial Aid Office |
| Enrollment Services Center | Registration & Records |
| Facilities Management and Planning | Sustainability |
| Information Technology | Classroom and Media Services |
| Information Technology | Information Services |
| Information Technology | Network Services |
| Information Technology | Technology purchasing |
| Information Technology | User Support and Help Desk |
| Institutional Research | Institutional Research |
| International Programs | International Student Services |
| McNair Program | McNair Program |
| Office of Student Affairs | Student conduct and community standards |
| Office of Student Affairs | Student intervention and case management |
| Office of Student Affairs | Student Support Network |
| President's Office | Community/external relations |
| President's Office | Leadership and strategic planning |
| Provost Office | Accreditation and assessment |
| Student Health & Wellness Center | Mental Health |
| Student Life | Civic Engagement and Sustainability |
| Student Life | SU building administration |
| University Housing | Conferences |
| University Housing | Family Housing |
| University Housing | Residence Halls |
| University Housing | Residential Life |

## Quintile 2

| Department Name | Program Name |
| --- | --- |
| Academic Advising and Support | Academic Advising |
| Athletics | Administration |
| Bookstore | Brand and logo |
| Bookstore | Technology |
| Business Services | Accounting & Reporting |
| Business Services | Collections |
| Business Services | Payroll |
| College of Arts & Sciences | Administration |
| Continuing Education | Programs for Adults |
| Continuing Education | Youth Residential Camps, Classes, & Activities |
| Development/Foundation | Finance and Admin |
| Enrollment Services Center | Commencement |
| Facilities Management and Planning | Building Maintenance |
| Facilities Management and Planning | Landscape Services |
| Higher Education Center | HEC building administration |
| Higher Education Center | Student Services |
| Higher Education Center | Testing Services |
| Human Resource Services | Training & Development |
| International Programs | Education Abroad |
| Jefferson Public Radio | Jefferson Public Radio |
| Library | Access Services |
| Library | Instruction |
| Library | Reference Services |
| President's Office | Administration |
| President's Office | Government relations |
| Small Business Development Center | Small Business Development Center |
| SOU Laboratory of Anthropology (SOULA) | SOU Laboratory of Anthropology |
| Southern Oregon Arts and Research | Southern Oregon Arts and Research |
| Student Health & Wellness Center | Medical Clinic |
| Student Life | Diversity and Inclusion |
| Student Life | Queer Resource Center |
| University Housing | Dining and vending |

## Quintile 3

| Department Name | Program Name |
| --- | --- |
| Academic Advising and Support | First Year Mentoring Program (Student Success) |
| Academic Advising and Support | Veteran Services and Benefits |
| Athletics | Volleyball |
| Bookstore | General merchandise |
| Career Development Services | Career Development Services |
| Center for Instructional Support | Center for Instructional Support |
| Continuing Education | OLLI |
| Disability Resources | University Coaching and Academic Mentoring |
| Enrollment Services Center | Front office operations (ESAs) |
| Enrollment Services Center | Production & Support |
| Facilities Management and Planning | Custodial Services |
| Facilities Management and Planning | Environmental Health & Safety |
| Facilities Management and Planning | Planning (capital repair and improvement projects) |
| Facilities Management and Planning | Utilities |
| Grants & Sponsored Programs | Grants & Sponsored Programs |
| Grants & Sponsored Programs | Institutional Research Board (IRB) |
| Human Resource Services | Benefits |
| Human Resource Services | Hiring |
| Human Resource Services | Labor Relations |
| Provost Office | Administration |
| Provost Office | Faculty Development |
| Provost Office | Graduate Studies |
| Rogue Valley Community Television | Academic Support |
| Rogue Valley Community Television | Government Access |
| Southern Oregon Research Center (SOURCE) | Southern Oregon Research Center |
| Student Health & Wellness Center | Outreach/Education |
| Student Life | Clubs and Organizations |
| Student Life | Commuter Resource Center |
| Student Life | Recreation- intramurals, club sports |
| Student Life | Student Publicity Center |
| Student Life | Women's Resource Center |
| Success at Southern | Success at Southern |

## Quintile 4

| Department Name | Program Name |
|---|---|
| Admissions | Operations |
| Athletics | Athletic Trainers |
| Athletics | Fitness/Rec Center |
| Athletics | Football |
| Athletics | Men's & Women's Cross Country |
| Athletics | Men's & Women's Track & Field |
| Athletics | Sport Camps |
| Athletics | Women's Basketball |
| Athletics | Women's Soccer |
| Athletics | Wrestling |
| Budget Office | Planning & Forecasting |
| Business Services | Bursar & Accounts Receivable |
| Business Services | Purchasing/Travel |
| College of Arts & Sciences | Chamber Music Concerts |
| Development/Foundation | Alumni Office |
| Facilities Management and Planning | Campus Mail Services |
| Finance and Administration Office | Risk Management |
| Higher Education Center | Outreach |
| International Programs | Intensive English Program |
| Learning Commons/Writing Center | Learning Commons/Writing Center |
| Library | Administration |
| Library | Collection Development |
| Library | Technical Services |
| Office of Student Affairs | Administrative oversight |
| President's Office | Campus policies |
| Provost Office | Campus Theme |
| Provost Office | Curriculum and academic catalog |
| ROAR - Raider Orientation and Registration | ROAR - Raider Orientation and Registration |
| Rogue Valley Community Television | Community Access |
| Student Life | Multicultural Resource Center |
| Student Life | Outdoor programs |
| Student Life | Student Government Support and Student Fee Admin |

## Quintile 5

| Department Name | Program Name |
|---|---|
| Amistad Program | Amistad Program |
| Athletics | Cheerleading |
| Athletics | Men's Basketball |
| Athletics | Softball |
| Athletics | Sports Information |
| Budget Office | Position Control |
| Business Services | Printing & Copy Services |
| Campus Public Safety | Parking |
| College of Arts & Sciences | Facility Rentals (camps, pool, etc.) |
| College of Arts & Sciences | Music Department Hosted Festivals |
| College of Arts & Sciences | Schneider Museum of Art |
| College of Arts & Sciences | Shakespeare Studies Visiting Groups |
| Community Preschool at SOU | Community Preschool |
| Development/Foundation | SOU Foundation affiliates |
| Facilities Management and Planning | Lock Shop |
| Facilities Management and Planning | Motor Pool |
| Facilities Management and Planning | Support Services (admin, accounting, FAMIS) |
| Finance and Administration Office | Administrative Functions for the Office |
| Finance and Administration Office | Contracting |
| Grants & Sponsored Programs | Institutional Animal Care and Use Committee (IACUC) |
| Information Technology | Switchboard operations |
| Interactive Marketing & Communication | Branding and marketing |
| Interactive Marketing & Communication | Electronic communications |
| Interactive Marketing & Communication | Graphics and publications |
| Interactive Marketing & Communication | Media Relations |
| International Programs | National Student Exchange Program |
| Library | Government Publications |
| Library | Library Systems |
| Provost Office | Resource management |
| Schneider's Children Center | Schneider's Children Center |
| Student Health & Wellness Center | Healthy Campus Initiative |
| Student Life | Inter-Club Council |

# Academic Program Prioritization Report

May 15, 2013

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## Introduction

Much has been written about the state of public higher education and the challenges faced by colleges and universities in meeting the ever-changing demands of a society that has grown less willing to invest in the future. Dwindling public support, particularly during an era of unprecedented technological expansion and globalization, means that what were once well accepted, even respected, ideals are no longer considered sufficient reasons for investing in public higher education. As a consequence, institutions, particularly regional, comprehensive institutions like Southern Oregon University, increasingly find themselves in the midst of budget crises that drive critical decisions and planning processes. It is within this context that the process of academic program prioritization was developed. The objective of this process is to find the proper balance in allocating resources among programs deemed essential to achieving the mission and strategic goals of the institution. It is our hope that the work represented by this report will contribute to a strategic planning process that achieves such a balance and results in a more distinctive and sustainable SOU.

## Prioritization Guiding Principles

The following were established and agreed upon by both Academic and Academic Support PPGs at the outset of the prioritization process:

The process will be fair, honest, forthright, and responsible. It will follow the best examples of development and implementation undertaken by other universities throughout the nation. The process shall be open and transparent, with no a priori decisions having been made, and with decisions made based on the published criteria.

In order to set realistic priorities, it will be necessary to rank all programs by quintiles. The process will offer the opportunity for enrichment of programs, as well as the possibility of contraction or elimination.

- We will embrace a culture of evidence, one that ensures that program decisions now and in the future will be data-driven.
- To enable better decisions in the future, the large database established for prioritization will be maintained going forward.
- Transparent: The study criteria will be collaboratively developed, approved, and well-publicized in advance of the study.
- Comprehensive: The study criteria will be broad in scope so as to encompass all aspects of a program.
- Consistent: The same study criteria will be applied to each program; only their measurement may change as appropriate.
- Inclusive: All university programs - instructional, student service, and administrative will be analyzed, and all university employees will have the opportunity to participate in the analysis of their programs.
- Demand-driven: The study will measure the demand for all programs as determined by students, employers, or internal constituents.
- Data-based: The study will be based on both quantitative and qualitative data.

## Decision Making Process

Initially, both the Academic and Academic Support PPGs agreed upon the same decision making process (see Guiding Principles on the Prioritization website). Due to the departure from SOU of one of the original group members, the Academic PPG had to modify the process as follows.

Quorum: 6 out of 8 members must be present either in person or via phone or other digital conferencing method to conduct any formal meeting.
Voting:

- Any decision requiring a formal vote requires all (8) PPG member votes.
- All formal votes will require a criterion of consensus minus one which is equivalent to 7/8ths.
-  If the group cannot reach the 7/8ths level of support, the decision will be tabled until the next official meeting. At that time, if the group still cannot meet the 7/8ths criteria, a fall back criteria of 6/8ths will be implemented for that particular decision.
- For all decisions about placing programs in quintiles, any department/program that does not receive at least 6/8ths support for placement in the top four quintiles will, by default, be placed into the bottom quintile.

In addition, every program report was individually reviewed and scored by each member of the Academic PPG. Programs were scored on 9 criteria (100 pts total): history, development and university expectations (5 pts), external demand (10 pts), internal demand (10 pts), quality of program inputs and processes (10 pts), quality of program outcomes (15 pts), size and productivity (15 pts), revenue and cost (15 pts), impact, justification, and overall essentiality (10 pts), and opportunity analysis (10 pts). Program scores assigned by individual reviewers were examined, compared, and discussed by the entire group to arrive at an initial ranking. Rankings were confirmed or adjusted and finalized by vote, as described above.

Program rankings are based on retrospective information provided in individual program reviews and reflect comparisons relative to other programs. Incomplete or poor responses on program reviews resulted in lower overall scores, and potentially lower rankings. A total of 183 academic programs were identified and evaluated. Each quintile contains 33 programs. An additional 18 programs were less than two years old and therefore did not have adequate data or information to be effectively scored or placed into quintiles.

## Reflections on the Process

The members of the Academic PPG believe that this process has the potential to be beneficial to the University in a number of ways. The process has allowed departments to take a holistic look at their programs and has allowed the university to compare programs based on multiple common metrics, both qualitative and quantitative. To a certain extent, this process has established an increased level of transparency regarding SOU programs and their characteristics. Most importantly, we hope that the work done throughout this process provides a useful tool for strategic planning and investment, and lays the groundwork for future program review.

The committee recognizes that the process is imperfect, and offers the following observations as guidance for future prioritization teams. Much of the data were aggregated by discipline/department, thereby obscuring the actual numbers of the programs being evaluated (e.g. class size, teaching evaluations, and, most importantly, cost ratio.) We recommend that future prioritization assessments align the granularity of the data with definitions of the programs. We also believe that it would be helpful for the institution to establish, regularly monitor, and post online key performance indicators at the program level.

In reflecting on the composition of the report categories and the associated rubric, the committee believes that they were appropriate and meaningful. Certainly, though, measurement and evaluation of these categories could be improved in future prioritization efforts. For example, the assessment of the interdependencies and synergies of programs could be tightened. Additionally, a more standardized approach for external demand could be developed.

Moving forward, it is our hope that the prioritization process will be followed by a conscious, engaged, and transparent strategic planning process. We would like to thank and compliment the writers of the reports for their honest and thoughtful evaluations of their programs. Writing these reports required significant time and energy, and we urge the administration and the entire campus community to review the reports posted online.


## Quintile Definitions

The Academic PPG Committee used the following definitions to make the final decisions for assigning programs to quintiles:

1. *Enhance*
Programs assigned to this category generally received high overall program scores. Investment in these programs should be a priority to strengthen the academic performance of the university.

2. *Maintain and possibly enhance*
Programs assigned to this category generally received medium to high overall program scores. Continued support of these programs, at or above their current resource allocation, is central to maintaining the academic performance of the university.

3. *Maintain*
Programs assigned to this category generally received medium overall program scores. Continued support of these programs, at or near their current resource allocation, is central to maintaining the academic performance of the university.

4. *Review*
Programs assigned to this category generally received medium to low program scores. Programs in this category contribute to the academic quality of the university, but curricular reorganization and/or resource reduction is required for long-term viability on contribution of these programs.

5. *Restructure*

Programs assigned to this category generally received low program scores. Restructuring, consolidating, or eliminating these programs will permit the redistribution of resources to targeted programs and/or will enhance the academic performance of the university.

## New Program Definition

New programs implemented in AY 2011 or later were not placed into quintiles because they could not be adequately assessed at this time. These programs have potential to contribute to the academic performance of the university. A careful review of these programs should be conducted within the next three years.

## Program Rankings by Department

### Anthropology

Anthropology (BA/BS) (Quintile 2)
Strong, high-quality program that supports the university mission and vision. Resources at or above current levels are recommended to maintain program quality.

Minor in Anthropology (Quintile 4)
Program has low demand and is not critical to the university and/or other programs. Review is recommended.

Applied Cultural Anthropology Certificate (Quintile 4)
Program has low demand, graduates few students, and does not significantly contribute to the success of the university and/or other programs. Review is recommended.

Cultural Resource Management Certificate (Quintile 4)
Though it may contribute unique offerings, the program has low demand, graduates very few students, and does not significantly contribute to the success of the university. Review is recommended for potential consolidation with similar programs.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 3)
Program supports the university mission and vision and delivers moderately large SCH. Maintaining the current resource level is recommended.

### Art and Art History

Art History (BA) (Quintile 4)
Internal and external demand for this major is low, with a low number of graduates. Review is recommended.

Studio Art (BA/BS) (Quintile 1)
Program aligns well with the mission of a liberal arts university with strong connection to the regional arts community. Recommend enhancement.

<u>Studio Art</u> (BFA) (Quintile 3)
Strong program with modest enrollment. Maintaining the resource level is recommended.

<u>Minor Art History</u> (Quintile 4)
Program shows modest enrollment increase in last two years. Review is recommended to enhance interdisciplinary opportunities.

<u>Minor Digital Art and Design</u> (Quintile 5)
Program goals seem better served by EMDA. Consolidation with the EMDA minor is recommended.

<u>Minor General Studio Art</u> (Quintile 5)
Program serves surprisingly few students, given the importance of the arts in the local community. Restructure is recommended to broaden appeal.

<u>Minor Photography</u> (Quintile 5)
Program serves few students. The report also received relatively low scores in the area of program essentiality and opportunity. Restructure is recommended.

<u>Gen Ed/Service/Other Demand for Course Delivery</u> (Quintile 2)
Program supports the university mission and vision, and the art history courses generate relatively large SCH. Resources at or above current levels are recommended to support growth and quality.

## Biology
<u>Biology (BA/BS)</u> (Quintile 2)
Strong program with consistent placement of graduates. It utilizes the bioregion and supports the mission and vision of the university. Resources at or above current levels are recommended to enhance program quality.

<u>Ecology, Organismal and Field Biology Option (BA/BS)</u> (Quintile 2)
Strong program that has increased significantly in number of graduates and SCH over the last 5 years. It utilizes the bioregion and supports the mission and vision of the university. Resources at or above current levels are recommended to continue program growth and increase quality.

<u>Minor Biology</u> (Quintile 4)
Program serves relatively few students. It is not essential to the university and/or other programs. Review is recommended.

<u>Certificate Botany</u> (Quintile 5)
Program serves very few students. It is not essential to the university and/or other programs and same outcomes can be achieved through Biology major. Recommend elimination or consolidation within major.

Environmental Education (MS) (Quintile 1)
Strong, distinctive program that supports the university mission and vision. It attracts students nationwide and utilizes the bioregion. Increased resources are recommended to support growth and enhance quality.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 2)
Program generates very high SCH and is necessary for pre-majors in health disciplines and majors in biochemistry. Resources at or above current levels are recommended to increase program quality.


## School of Business

Business Degree Completion (Quintile 1)
Strong program with significant potential for further growth, particularly with online offerings. Demand for courses exceeds the current capacity of the department.

Marketing (BA/BS) (Quintile 3)
Strong program, but no new investment warranted.

Management (BA/BS) (Quintile 1)
Large number of graduates and high external demand. Management is the largest major in the School of Business with a well-deserved reputation.

Hospitality and Tourism (BA/BS) (Quintile 2)
Relatively low numbers of graduates historically, but has the potential to grow given regional connections and recent curricular revisions.

Accounting (BA/BS) (Quintile 2)
Very strong external demand for graduates along with strong enrollment, increasing over the past five years. The PPG suspects this program's strengths were not adequately reflected by the report submitted.

Management (BAS) (Quintile 2)
Solid program that serves unique niche in Oregon.

Hospitality and Tourism (BAS) (New Program)
New program without enough data to evaluate, has the potential to grow given regional connections. Program should be re-evaluated in two or three years.

Business Administration (MBA) (Quintile 3)
Strong program, no new investment warranted, currently meeting demand, probably has limited opportunities for growth.

Management (MiM) (Quintile 3)
Strong program, no new investment warranted, serves unique niche in region, but probably limited opportunities for growth.

<u>Minor Business Administration</u> (Quintile 3)
Strong enrollment for a minor program, no new investment warranted.

<u>Certificate Applied Finances & Economics CAFÉ</u> (Quintile 3)
Strong program. High number of graduates for a certificate program, and also high external demand for program graduates. Recommend maintaining.

<u>Certificate Business Information Systems CBIS</u> (Quintile 3)
Strong program with high external demand; however, no new investment warranted.

<u>Certificate Interactive Marketing & E-Commerce CIMeC</u> (Quintile 2)
Intriguing interdisciplinary program with likely growth potential. High external demand for program graduates. Recommend maintaining or enhancing.

<u>Certificate Management of Human Resources CMHR</u> (Quintile 3)
Strong program, no new investment warranted, relatively low demand but good job prospects for graduates.

<u>Certificate Nonprofit Management CNPM</u> (Quintile 4)
Small program that could serve regional needs. Not currently a program of distinction but has potential, warrants some attention to determine why it has not attracted more students.

<u>Certificate International Business IBC</u> (Quintile 5)
While promising, this program has not taken off, posting small numbers since it was established in 2009.

<u>Certificate Post Baccalaureate in Accounting</u> (Quintile 3)
Low cost program. Relatively small number of students but program provides a valuable resource for local post-bacc students. Recommend maintaining.

<u>Certificate in Sustainability Leadership</u> (Quintile 5)
While this program seems like a natural for SOU, it has remained small since its inception in 2008. There is little vision or direction evident in the report submitted.

<u>Gen Ed/Service/Other Demand for Course Delivery</u> (Quintile 5)
Large number of SCHs, though not particularly productive given the size of the Business faculty. Nevertheless, the PPG suspects this program's strengths were not adequately reflected by the report submitted.


**Chemistry**
<u>ACS Biochemistry Option (BA/BS)</u> (Quintile 1)
Small, but distinctive program with very strong student outcomes and placement after graduation.

<u>ACS Chemistry Option (BA/BS)</u> (Quintile 1)
Small, but distinctive program with very strong student outcomes and placement after graduation.

Chemistry Option (BA/BS) (Quintile 2)
Small program with strong external demand and good student outcomes and placement after graduation.

Forensic Chemistry Option (BA/BS) (Quintile 4)
Popularity of the "forensics" title has led to increase (albeit modest) in SCH and graduates in recent years. Little distinction between this and Chemistry Option (2 courses). Not essential to university mission. Consider consolidation with Chem major.

Co-Major Business-Chemistry (Quintile 5)
Virtually no internal or external demand, nor interest by either department to continue offering this option. Recommend elimination.

Minor Chemistry (Quintile 4)
Small program that has decreased in productivity in recent years due to reduced course offerings. Generally supports other STEM fields so low internal demand.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 3)
Modest size GSO in terms of SCH, strong contributions to other science programs. Maintain current level of support.


**Communication**
Communication Studies Concentration (BA/BS) (Quintile 1)
Relatively large, productive major, well-aligned to university mission. Recommend enhancement.

Film, Television, & Convergent Media Concentration (BA/BS) (Quintile 1)
Distinctive program with potential to enhance regional visibility. Recent revisions to curriculum integrated several discrete programs, allowing for greater efficiencies.

Minor Communication Studies (Quintile 3)
Relatively large minor with strong internal demand. Recommend maintaining.

Minor Conflict Resolution (New Program)
New program with little or no data for evaluation. Though distinctive, the program currently relies on a single faculty member who is retiring, so will require significant investment to maintain or grow.

Minor Film, TV and Convergent Media (Quintile 2)
Distinctive minor with strong growth potential and external demand. In the process of restructuring to combine three previous minors into a more cohesive overall program.

Certificate Conflict Resolution (New Program)
As with the Minor in Conflict Resolution, this is a new program with little or no data for evaluation. Though distinctive, the program currently relies on a single faculty member who is retiring, so will require significant investment to maintain or grow.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 2)
Strong, productive program with high internal demand.


## Computer Science
Computer Science (BA/BS) (Quintile 1)
Program has high external demand and graduates a significant number of students. Recent restructuring of the major will allow this department to both grow and increase quality with enhanced resources.

Applied Computer Science (MS) (Quintile 5)
Very young program that has been difficult to support and promote given current capacity within CS, so has failed to live up to expectations.

Minor Computer Science (Quintile 5)
Very low demand for this minor with current structure. Revisit.

Co-Major Mathematics-Computer Science (Quintile 4)
Program to undergo thorough review in 2013-14. Currently, very low demand and not essential to university mission.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 3)
Knowledge of technology integral to a university education. General education and service offerings generate relatively large SCH and contribute to diverse disciplines across campus.


## Criminology and Criminal Justice
Criminal Justice (BA/BS) (Quintile 1)
Strong program with large number of graduates, high productivity, and notable reputation in state. Serves unique niche in the region and has potential for continued growth.

Criminal Justice w/emphasis in Forensics (BA/BS) (Quintile 4)
Strong student interest; however, limited job prospects reduce the utility of the degree because of the disconnect between student expectations and job requirements. Student interest may be better served with a CCJ major in conjunction with computer science and/or chemistry course offerings.

Minor Criminal Justice (Quintile 3)
Strong program with value for many majors across campus. No new investment warranted.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 3)
Productive program serving university community. No new investment warranted.


## Economics
Economics (BA/BS) (Quintile 2)
Although a relatively small major, it's distinctive and has strong external demand. Productive program with growth potential and opportunities for additional collaboration across campus.

Minor in Economics (Quintile 1)
Distinctive program that has both strong external and internal demand. One of the largest minor programs on campus, aligning with many areas of study.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 1)
Strong, productive program that serves many students across disciplines. Although medium SCH compared to other GSO programs, it is integral to the success of many majors, including business and international studies.

## Emerging Media and Digital Arts

Emerging Media and Digital Arts (BA/BS) (New Program)
New program slated to begin in Fall 2013. Distinctive, interdisciplinary program with potential for high visibility and student interest. Program should be re-evaluated in two or three years.

Minor Emerging Media and Digital Arts (New Program)
Distinctive, interdisciplinary program that has shown growth potential over a short period of time. Not enough data to evaluate at this time. Program should be re-evaluated in two or three years. Potential to subsume the Digital Art and Design minor within this program.

Gen Ed/Service/Other Demand for Course Delivery (New Program)
A model for collaboration, EMDA has a large growth potential in an emerging area of study. Not enough data to evaluate at this time. Program should be re-evaluated in two or three years.

## School of Education

The School of Education provides a number of quality, distinctive programs that provide key linkages to local/regional schools. The most recent state accreditation resulted in unconditional approval of all School of Education licensure programs. Ongoing program evaluations are monitored by the state accrediting body for teacher licensure programs. The School of Education is well-positioned to take advantage of policy initiatives and funding priorities identified by the Oregon Education Investment Board (OEIB) and other governing bodies.

Education Early Childhood Development (BA/BS) (Quintile 1)
Strong Program. Potential for large growth since high priority for the Oregon state government and the U.S. government. Recommend enhancement.

Education Elementary – licensure track (BA/BS) (Quintile 1)
Important program with growth potential that supports university mission by meeting regional and state needs for public school teachers. Important feeder degree for School of Education master programs. Recommend enhancement.

Education Elementary – degree track (BA/BS) (Quintile 1)
Strong Program with growth potential that supports the university mission and serves as a preparatory program for non-licensure teaching opportunities and graduate programs. Recommend enhancement.

Masters in Art of Teaching (MAT) – licensure track (Quintile 1)
Flagship graduate program with high quality indicators and strong enrollment. Strong opportunity analysis. Recommend enhancement.

Masters in Education (MEd MS) (Quintile 1)
Large, consistent number of graduates. Essential for educators to meet state mandates. Recommend enhancement.

Masters in Education in Special Education (MEd, MA, MS) (Quintile 1)
Consistent enrollments and high external demand for graduates. Recommend enhancement.

Minor Early Childhood Development (New Program)
New program without enough data to evaluate. Potential for growth due to new Federal requirements for Head Start teachers. Program should be re-evaluated in two or three years.

Minor Education (Quintile 4)
Enrollment in the minor has dropped in recent years, likely due to introduction of undergraduate major in Education. Recommend revisiting the minor to 'rebrand' for broader interest.

Certificate Initial Administrative Licensure (Quintile 2)
Important program that provides a viable option for those seeking an administrative license in the region. Size compares favorably with other state programs. Recommend maintaining or enhancing.

Certificate Continuing Administrative Licensure (Quintile 3)
Natural fit with initial administrative licensure program, but limited opportunity for growth. Recommend maintaining.

Certificate Special Education (Quintile 1)
Exhibits strong enrollment and graduate trend. High external demand for graduates. Recommend enhancement.

Certificate English as a Second Language ESOL (Quintile 1)
Provides important endorsement option that supports regional demographic needs. Consistently successful in securing external funding. Recommend enhancement.

Certificate READ Oregon (Quintile 3)
Relatively small program providing an important service for regional educators. Recommend maintaining.

Continuing Licensure or Additional Endorsement (Quintile 1)
Provides essential opportunity for current educators to meet state mandates for an advanced license required to continue teaching in Oregon. Recommend enhancement.

<u>Gen Ed/Service/Other Demand for Course Delivery</u> (Quintile 4)
Program has showed steady decrease in SCH possibly due to addition of undergraduate programs. Program is small relative to other GSO programs across campus.

## English and Writing

The English and Writing program has been organized into distinct concentrations including English Education, Professional Writing, Creative Writing, and Literary Studies. The diversity of offerings appears to have diluted the number of students in some concentrations.

<u>Concentration Creative Writing (BA)</u> (Quintile 2)
Program appears to have a strong opportunity for growth and fits well within the local community. Recommend maintaining and possible enhancement.

<u>Concentration English Education (BA)</u> (Quintile 1)
Strong program and essential to University mission. Continuing high demand for teachers enhances utility of this degree. Recommend enhancement.

<u>Concentration Literary Studies (BA)</u> (Quintile 3)
Supports other English majors and other programs on campus. Recommend maintaining.

<u>Concentration Professional Writing (BA/BS)</u> (Quintile 5)
Low number of graduates and limited cost effectiveness with required internships and capstone experience. Recommend restructuring or elimination as suggested by the department.

<u>Concentration Special Studies in English and Writing (BA)</u> (Quintile 5)
Small number of graduates. Recommend restructuring or elimination as suggested by the department.

<u>Minor Creative Writing</u> (Quintile 4)
The program may have potential for growth but currently serves a small number of students. Recommend review.

<u>Minor English Education</u> (Quintile 5)
Although the English Education minor is connected with the School of Education, data over the past five years show consistently low enrollment for the minor. May be useful to merge this minor with other minor concentrations in order to create a more general minor in English. Recommend restructuring or elimination.

<u>Minor Literary Studies</u> (Quintile 5)
Low enrollment suggests consolidation with other concentrations within the program to create a more general minor. Recommend restructuring or elimination.

<u>Minor Professional Writing</u> (Quintile 5)
LLP department proposes eliminating this minor. Recommend restructuring or elimination.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 5)
Program appears to provide a valuable service to the University but the report did not represent the program well.

## Environmental Studies
Although the Committee recognizes the adaptability, quality, and relevance of Environmental Studies, the overall number of relatively specialized concentrations dilutes the number of students in each. Strongly recommend review and consider consolidation of programs.

Cultural Resource Management Concentration (BS) (Quintile 5)
The program is too similar to the Cultural Resource Management Certificate and serves very few students who would be better served by pursuing the certificate. Recommend elimination.

Watershed Science Concentration (BS) (Quintile 4)
Low enrollment, but newer concentration with anticipated growth. Review recommended.

Ecology and Conservation Concentration (BS) (Quintile 4)
A relatively small program, but larger and increasing SCH and more graduates compared to other ES major options. Review recommended.

Land Use Planning Concentration (BS) (Quintile 4)
Although increasing SCH and stable graduate numbers (averaged at 4) over the last 5 years, this program is relatively small compared to other majors. Review recommended.

Sustainability and Policy Concentration (BS) (Quintile 4)
A relatively small program, but SCH has grown over last five years. Second to the Ecology and Conservation in generation of SCH and graduates among ES major options. Review recommended.

Minor Environmental Studies (Quintile 5)
Very low enrollment over the past five years. Recommend restructuring or elimination.

Minor Geology (Quintile 5)
The Geology minor has very low enrollment and is not an essential program in Environmental Studies. Recommend restructuring or elimination.

Minor Land Use Planning (Quintile 4)
This is an interdisciplinary program but low headcount and SCH. Pending retirements will likely make the program vulnerable. Recommend review.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 4)
Although the program has the potential to provide substantial service to the University community, it suffers from staffing concerns. Program could be an important contributor to the Greenhouse. Recommend review.

## Foreign Languages & Literature

<u>French Language & Culture option (BA)</u> (Quintile 3)
Low demand for major, but important for university mission. Maintain at current level of support.

<u>Spanish Language & Culture option (BA)</u> (Quintile 1)
Medium size program with high potential for growth as demographics change in region and state. Aligns well with university mission.

<u>Minor French</u> (Quintile 3)
Low demand for minor, but low marginal cost due to strength of GSO and major class offerings. Maintain at current level of support.

<u>Minor German</u> (Quintile 5)
Very low demand for the minor; however, German language valuable as GSO. Recommend re-allocating resources to support service courses.

<u>Minor Spanish</u> (Quintile 2)
Relatively large minor with high potential for growth. Increased regional and national demand for Spanish proficiency. Minor essential for liberal arts mission and integrates well with many majors.

<u>French Language Teaching (MA)</u> (New Program)
New program without enough data to evaluate. Has potential for success as it's modeled after the Spanish Language Teaching program that has shown success. Program should be re-evaluated in two or three years.

<u>Spanish Language Teaching (MA)</u> (Quintile 2)
A small, unique program that is both productive and cost effective. Serves a niche market which provides a national presence for SOU. Program thrives but does not appear to need significant additional resources.

<u>Gen Ed/Service/Other Demand for Course Delivery</u> (Quintile 1)
An essential program for SOU as a liberal arts university that provides ability to offer students a BA option and increases diversity on campus with strong breadth of class offerings. Large internal demand that generates second largest SCH of all programs.


## Gender, Sexuality and Women's Studies

<u>Minor in Gender, Sexuality and Women's Studies</u> (Quintile 3)
Low external demand, but a high quality interdisciplinary program that aligns with university mission. Recommend maintaining.

<u>Gen Ed/Service/Other Demand for Course Delivery</u> (Quintile 2)
GSO offerings show strong alignment with university mission. Recommend maintaining or possible enhancement.

## Geography

Minor in Geography (Quintile 3)
Though it graduates a relatively small number of students, it serves and complements many other programs and initiatives. Recommend maintaining.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 2)
Geospatial emphasis necessary for multiple programs, but GIS laboratory constrains growth in this program. Recommend maintaining or enhancing.

## Health, Physical Education and Leadership

Health and Physical Education (BA/BS) (Quintile 1)
Program shows moderate growth over last 5 years, generates high SCH and graduates a sizable number of majors. Large external demand and potential to increase enrollments and quality with enhanced resources.

Minor Military Science (Quintile 3)
No personnel costs to SOU, and notable recruiting vehicle for students interested in military. Recommend maintaining at current levels.

Outdoor Adventure Leadership (BA/BS) (Quintile 2)
Program is relatively new, has shown positive growth, and offers diverse opportunities that effectively utilize regional resources. Some concern that it is delivered almost entirely by professional track and adjunct faculty. Recommend maintaining at current levels or enhancing.

Minor Outdoor Adventure Leadership (Quintile 4)
Small minor with limited internal demand and not well-integrated with other campus programs. Some concern that this program delivered almost entirely by professional track and adjunct faculty. Recommend reviewing.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 3)
Program generates large, stable SCH and supports student health and activity. Recommend maintaining at current levels.

## History

History (BA/BS) (Quintile 1)
Program has consistently graduated a relatively large number of majors and generated high SCH with few faculty over the last 5 years. The PPG acknowledges the adaptability of the program and the increased quality that has resulted from the merger with Political Science. Recommend enhancement.

Minor History (Quintile 4)
Relatively few degree recipients and not essential for other programs. Recommend review.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 2)
Program services a high number of SCH, and courses support a number of other degree programs and University Studies strands. Recommend maintaining or enhancing.

## Interdisciplinary Studies

Interdisciplinary Studies (BA/BS) (Quintile 5)
This program leverages courses from many other disciplines, but lacks leadership. Recommend restructuring.

Interdisciplinary Studies (MIIS) (Quintile 4)
The PPG acknowledges this program has already been restructured and experienced a "dormant" year. The program continues to struggle with low numbers of graduates, SCH and faculty participation. Recommend review.

## International Studies

International Studies (BA/BS) (Quintile 4)
The potential to support the SOU mission and interdisciplinary nature of the program are seen as strengths. The lack of dedicated faculty lines in IS weakens this program. Recommend a careful review due to relatively low number of graduates and heavy reliance on other programs.

Minor in International Studies (Quintile 5)
Similar to the major, this program is interdisciplinary and has the potential to support the SOU mission, but has low numbers of graduates. The lack of dedicated faculty lines in IS weakens this program. Recommend restructuring.

Minor Latin American Studies (Quintile 4)
This program is interdisciplinary and has the potential to support the SOU mission by strengthening ties to the region and the Guanajuato program, but has a low number of graduates. The lack of dedicated faculty lines in IS weakens this program. Recommend review.

Gen Ed/Service/Other Demand for Course Delivery **(**Quintile 5)
Though program is interdisciplinary and has potential to support the university mission, the lack of dedicated faculty lines in IS and therefore the low number of IS-prefixed courses weakens this program. Recommend restructuring.

## Mathematics

Mathematics (BA/BS) (Quintile 2)
Moderate size program with high productivity and strong student outcomes. Aligns with University mission in challenge, access and student success.

Applied Mathematics (PS Masters) (New Program)
New program without enough data to evaluate. Well aligned with SOU mission to serve the needs of the region. Program should be re-evaluated in two or three years.

Co-Major Financial Mathematics (Quintile 2)
Niche program with a fairly specific but solid external demand. Recently re-conceptualized to improve student outcomes and meet marketplace expectations. Effective partnership with Business; program has small number of graduates but exhibits growth potential.

Minor Mathematics Education (Quintile 2)
Supports important teaching programs, offering essential math sequence required for elementary teacher licensure and subject area training for middle school licensure. Potential to grow in size and expertise with national interest in STEM teaching and learning.

Minor Mathematics (Quintile 2)
Solid program with the versatility to add quantitative competencies to numerous majors.

Minor Statistics (New Program)
A recently developed program, with small numbers but has an applied, interdisciplinary nature. Potential asset to other majors that emphasize data analysis.

Developmental Math & Tutoring (Quintile 2)
Serves valuable function for retention and advancement. Provides foundational skills needed in other programs. Recommend maintaining the self-funded structure in order to continue offering service to students.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 1)
Essential program with high internal demand. Provides foundational skills for many programs on campus.


## Music

The Music program is an essential component of a liberal arts education and it has established itself as a valuable asset to the University and as a representative of Southern Oregon region. In general, the music offerings are quality programs with low numbers and high costs. In anticipation of significant facilities renovations, the program should continue to identify programmatic strengths, efficiencies and new growth opportunities.

Music (BA/BS) (Quintile 2)
Important program for liberal arts university with strong ties to our community and region. Strong faculty. High cost of equipment and instruction results in a low revenue to cost ratio. Recommendation to maintain or increase resources to encourage program growth.

Concentration Elementary General Music (BA/BS) (New Program)
New program without enough data to evaluate. Program should be re-evaluated in two or three years.

Concentration Music Composition (BA/BS) (Quintile 5)
Highly specialized program with very low enrollments over last five years. Quality has been achieved, but ability to expand or improve dependent on availability of adjunct instructors. Committee recommends reconsideration of program goals and strategies and need for separate composition program.

Concentration Music Instruction (BA/BS) (Quintile 3)
An essential program to prepare future music teachers. Moderately low SCH and few graduates, though good placement in the field of teaching. Program is strengthening K-12 licensure and actively searching for interdisciplinary partnerships. Recommend maintaining at current levels.

Concentration Music Performance (BA/BS) (Quintile 3)
Small but distinctive program with productive faculty and strong student achievement on and off campus. Moderately low SCH and few graduates. Program is reviewing its curriculum to condense offerings. Recommend maintaining at current levels.

Minor Music (Quintile 5)
Small minor with weak internal demand.

Performance (MM) (New Program)
New program without enough data to evaluate. Program should be re-evaluated in two or three years.

Co-Major Music-Business (Quintile 5)
Low enrollments and lack of clear mission point to need for restructuring or elimination. Hard to see the connection with Business in this report. Same outcome might be achieved through a business minor. Department working on curricular changes that will replace this program. PPG supports restructure.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 3)
Program services a large number of students and is important for a liberal arts university, though it is not particularly cost effective. The planned addition of a minor differential tuition fee is expected to offset some expense. Recommend maintaining at current levels.

## Native American Studies
Minor in Native American Studies (Quintile 2)
Opportunity for consolidation with the certificate if populations served are not distinct. Modest demand but supports the mission of SOU and needs of the region. Program would benefit by having secure faculty lines.

Certificate in Native American Studies (Quintile 3)
Opportunity for consolidation with minor if populations served are not distinct. Modest demand but good fit with SOU mission and needs of the region.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 3)
Solid program connected to mission of the University. Internal demand draws students connected to other programs, adding essential cultural awareness component to University life.

**Philosophy**

Minor Philosophy (or Ethics) (Quintile 2)
A relatively small minor that aligns well with University mission and is central to liberal arts curriculum. Maintain and possibly enhance.

Minor Rhetoric and Reason (Quintile 4)
New program that aligns well with the University mission, but so far has very small enrollments and few graduates. Interdisciplinary focus.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 1)
Strong program linked to University mission. Serves a relatively large number of students with limited faculty resources. Recommend increased levels to encourage growth.


**Physics**

Overall, the PPG felt that Physics program had strong faculty and student outcomes but saw significant challenges because of the relatively low numbers of students served in the degree options. Strong recommendation to review programmatic offerings and consider consolidation.

Applied Physics Option (BA/BS) (Quintile 4)
Strong external demand and strong faculty/student outcomes but low enrollment program necessitates review. Recommend consolidating program offerings.

Standard Physics Option (BA/BS) (Quintile 4)
Strong external demand and strong faculty/student outcomes but low enrollment program necessitates review. Recommend consolidating program offerings.

Engineering Physics (BA/BS) (Quintile 5)
Strong external demand and strong faculty/student outcomes but extremely low enrollment program. Recommend close review of program.

Physics/Engineering Dual Degree Option (BA/BS) (Quintile 4)
Strong external demand but few graduates and extremely low SCH prompt a close review of program.

Materials Science (BS) (Quintile 4)
Strong external demand and strong faculty/student outcomes but low enrollment program necessitates review. Recommend consolidating program offerings.

Co-Major Business-Physics (Quintile 5)
Low external demand and low numbers of students served. Recommend close review of program and consider restructuring, consolidation or elimination.

Minor Physics (Quintile 5)
Low external demand and low numbers of students served. Recommend close review of program and consider restructuring, consolidation or elimination.

<u>Gen Ed/Service/Other Demand for Course Delivery</u> (Quintile 3)
Large SCH for faculty, with necessary contributions to science majors and pre-health professions. Recommend maintaining current levels.

## Political Science

<u>Political Science (BA/BS)</u> (Quintile 3)
The Political Science BA/BS is one of the more cost effective programs on campus because of the relatively low number of faculty. Strong external demand but relatively low internal demand beyond History and Environmental Studies. The small size of the faculty constrains the breadth of the program. The PPG acknowledges the adaptability of the program and the potential for increased quality due to the merger with History.

<u>Minor Political Science </u>(Quintile 4)
While the minor in Political Science was seen as cost effective, the PPG felt that the minor exhibited weak internal demand relative to other programs. The PPG also felt that other programs offered stronger opportunity analyses.

<u>Gen Ed/Service/Other Demand for Course Delivery</u> (Quintile 4)
While the GSO for Political Science was seen as cost effective, the PPG felt that their GSO exhibited weaker internal and external demand relative to other GSO programs.

## Psychology

<u>Psychology (BS/BA)</u> (Quintile 1)
High quality program outcomes. Very large, productive major and closely aligned with the mission of the university.

<u>Mental Health Counseling (MA/MS)</u> (Quintile 1)
Productive, nationally accredited graduate program. Strong potential for growth.

<u>Minor Psychology</u> (Quintile 2)
Large minor serving diversity of majors. Enhanced support of Psychology major will benefit this important minor.

<u>Degree Completion Human Services</u> (Quintile 2)
Program with strong regional ties that prepares undergraduates to meet growing demand for human services professionals. Delivery of program at HEC a strength.

<u>Gen Ed/Service/Other Demand for Course Delivery</u> (Quintile 1)
Strong contributor to general education across campus. Targeted investment to increase diversity of offerings would be advantageous.

<u>Social Justice Minor</u> (New Program)
New program without enough data to evaluate, has the potential to grow given regional connections.

## Sociology

Sociology (BS/BA) (Quintile 1)
The Sociology BS/BA program was given high marks for strong program outcomes and overall size and productivity relative to other programs. The PPG recognizes the recent loss of faculty lines and recommends enhancement of this program.

Minor in Sociology (Quintile 3)
The minor in Sociology, while valuable, was seen as average relative to other programs at SOU.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 3)
The GSO in Sociology had lower external demand but higher internal demand relative to other programs.

## Theatre Arts

Theatre Arts (BA/BS) (Quintile 1)
Program identified as distinctive and essential to the university, with quality faculty/student outcomes that contribute to the community. Recommendation for increasing current levels to enhance quality.

Theatre Arts (BFA) (Quintile 2)
Program identified as distinctive for the university but has low internal demand. Recommend to maintain or enhance current levels.

Theatre Studies in Production and Design (MA) (Quintile 3)
Program identified as distinctive for the university with a modest increase to the number of majors over the last 5 years. Recommend to maintain at current levels.

Minor Film Techniques (New Program)
New, distinct interdisciplinary program with potential to add value to Theatre Arts. No data yet to evaluate. Program should be re-evaluated in two or three years.

Minor Shakespeare Studies (Quintile 4)
The minor in Shakespeare Studies is a distinct program with potential for growth. New leadership for the program as well as the plans for a graduate degree in Shakespeare Studies suggest potential. Further review and/or reorganization are recommended.

Minor in Musical Theatre (New Program)
New, distinct interdisciplinary program with potential to add value to Theatre Arts. No data yet to evaluate. Program should be re-evaluated in two or three years.

Minor Theatre Arts (Quintile 5)
Current staffing levels are not adequate to support the Theatre Arts Minor. Program elimination recommended.

Gen Ed/Service/Other Demand for Course Delivery (Quintile 5)
The PPG recognizes that current demand for Theatre degrees combined with current staffing levels preclude significant course offering beyond Theatre. Recommend restructure to address these challenges.

University Seminar (Quintile 2)
Vital to ensure fundamental student outcomes and university mission. Very high SCH with potential to increase strength as retention tool. Recommend maintaining or enhancing.

## Other Academic Programs

Honors Program (Quintile 5)
Program serves few students and will be replaced with the Honors college within two years. Recommend restructuring.

Library Instruction (Quintile 5)
Program serves very few students though claims the potential to provide more offerings online. Recommend restructuring.

Learning Commons (New Program)
Program should be re-evaluated in two or three years. It is new without consistent data to evaluate. Potential to increase student success and retention.

Certificate in Regional Studies and Applied Research (New Program)
New program without enough data to evaluate, has the potential to grow given regional connections.

# Program Rankings by Quintile

## QUINTILE 1

| *Department Name* | *Program Name* |
|---|---|
| Art & Art History | Studio Art (BA/BS) |
| Biology | Environmental Education (MS) |
| Business | Business Degree Completion |
| Business | Business Management (BA/BS) |
| CCJ | Criminal Justice (BA/BS) |
| Communication | Communication Studies (BA/BS) |
| Communication | Film, TV, & Convergent Media (Major) |
| CPME | ACS Chemistry (BA/BS) |
| CPME | ACS Biochemistry (BA/BS) |
| CS | Computer Science (BA/BS) |
| Education | Continuing Licensure / Add'l Endorsement |
| Education | Early Childhood Development (BA/BS) |
| Education | Education (MEd MS) |
| Education | Elementary Degree Track (BA/BS) |
| Education | Elementary Licensure Track (BA/BS) |
| Education | English as a Second Language (Certificate) |
| Education | Masters of Arts in Teaching |
| Education | Special Education (Certificate) |
| Education | Special Education (MEd, MA, MS) |
| HPEL | Health and Physical Education (BA/BS) |
| HPS | History (BA/BS) |
| LLP | English Education (BA) |
| LLP | Foreign Language (Gen Ed / Service / Other) |
| LLP | Spanish (BA) |
| LLP | Philosophy (Gen Ed / Service / Other) |
| Mathematics | Math (Gen Ed / Service / Other) |
| Performing Arts | Theatre (BA/BS) |
| Psychology | Mental Health Counseling (MA/MS) |
| Psychology | Psychology (BA/BS) |
| Psychology | Psychology (Gen Ed / Service / Other) |
| SSPC | Economics (Gen Ed / Service / Other) |
| SSPC | Economics (Minor) |
| SSPC | Sociology (BA/BS) |

**QUINTILE 2**

| Department Name | Program Name |
| --- | --- |
| Art & Art History | Art & Art History (Gen Ed / Service / Other) |
| Biology | Biology (BA/BS) |
| Biology | Biology (Gen Ed / Service / Other) |
| Biology | Ecology, Organismal & Field Biology (BA/BS) |
| Business | Accounting (BA/BS) |
| Business | Hospitality & Tourism (BA/BS) |
| Business | Interactive Marketing & E-Commerce (Certificate) |
| Business | Management (BAS) |
| Communication | Communication (Gen Ed / Service / Other) |
| Communication | Film, TV, & Convergent Media (Minor) |
| CPME | Chemistry (BA/BS) |
| Education | Initial Administrative Licensure (Certificate) |
| HPEL | Outdoor Adventure Leadership (BA/BS) |
| HPS | History (Gen Ed / Service / Other) |
| LLP | Spanish Language Teaching (MA) |
| LLP | Spanish (Minor) |
| LLP | Philosophy (Minor) |
| LLP | Creative Writing (BA) |
| Mathematics | Developmental Math & Tutoring |
| Mathematics | Financial Mathematics (co-Major, Business) |
| Mathematics | Math (BA/BS) |
| Mathematics | Math (Minor) |
| Mathematics | Math Education (Minor) |
| Performing Arts | Music (BA/BS) |
| Performing Arts | Theatre (BFA) |
| Psychology | Human Services (Degree Completion) |
| Psychology | Psychology (Minor) |
| SSPC | Anthropology (BA/BS) |
| SSPC | Economics (BA/BS) |
| SSPC | Gender, Sexu. & Wom. Stud. (Gen Ed / Service / Other) |
| SSPC | Geography (Gen Ed / Service / Other) |
| SSPC | Native American Studies (Minor) |
| USEM | University Seminar |

**QUINTILE 3**

| Department Name | Program Name |
|---|---|
| Art & Art History | Studio Art (BFA) |
| Business | Accounting (Certificate) |
| Business / SSPC | Applied Finance & Economics (Certificate) |
| Business | Business (Minor) |
| Business | Business Administration (MBA) |
| Business | Business Information Systems (Certificate) |
| Business | Management (MiM) |
| Business | Management of Human Resources (Certificate) |
| Business | Marketing (BA/BS) |
| CCJ | Criminal Justice (Minor) |
| CCJ | Criminology & Criminal Justice (Gen Ed / Service / Other) |
| Communication | Communication (Minor) |
| CPME | Chemistry (Gen Ed / Service / Other) |
| CPME | Physics (Gen Ed / Service / Other) |
| CS | Computer Science (Gen Ed / Service / Other) |
| Education | Continuing Administrative Licensure (Certificate) |
| Education | READ Oregon (Certificate) |
| HPEL | Health & Physical Education (Gen Ed / Service / Other) |
| HPEL | Military Science (Minor) |
| HPS | Political Science (BA/BS) |
| LLP | French (Minor) |
| LLP | French Language & Culture (BA) |
| LLP | Literary Studies (BA) |
| Performing Arts | Music (Gen Ed / Service / Other) |
| Performing Arts | Music Instruction (BA/BS) |
| Performing Arts | Music Performance (BA/BS) |
| Performing Arts | Theatre Studies (MoTS) |
| SSPC | Anthropology (Gen Ed / Service / Other) |
| SSPC | Gender, Sexu. & Wom. Stud. (Minor) |
| SSPC | Geography (Minor) |
| SSPC | Native American Studies (Certificate) |
| SSPC | Native American Studies (Gen Ed / Service / Other) |
| SSPC | Sociology (Minor) |
| SSPC | Sociology (Gen Ed / Service / Other) |

**QUINTILE 4**

| *Department Name* | *Program Name* |
|---|---|
| Art & Art History | Art History (BA) |
| Art & Art History | Art History (Minor) |
| Biology | Biology (Minor) |
| Business | Non-Profit Management (Certificate) |
| CCJ | Criminal Justice - Forensics (BA/BS) |
| CPME | Applied Physics (BA/BS) |
| CPME | Chemistry (Minor) |
| CPME | Forensic Chemistry (BA/BS) |
| CPME | Materials Science (BS) |
| CPME | Physics Engineering Dual Degree (BA/BS) |
| CPME | Standard Physics (BA/BS) |
| CS | Computer Science (Co-Major, Math) |
| Education | Education (Gen Ed / Service / Other) |
| Education | Education (Minor) |
| ES | Ecology and Conservation (BS) |
| ES | Environmental Studies (Gen Ed / Service / Other) |
| ES | Land Use Planning (BS) |
| ES / SSPC | Land Use Planning (Minor) |
| ES | Sustainability & Policy (BS) |
| ES | Watershed Science (BS) |
| History | History (Minor) |
| HPEL | Outdoor Adventure Leadership (Minor) |
| HPS | Political Science (Gen Ed / Service / Other) |
| HPS | Political Science (Minor) |
| Interdisciplinary Studies | Interdisciplinary Studies (MIIS) |
| LLP | Creative Writing (Minor) |
| LLP | Rhetoric & Reason (Minor) |
| LLP | Shakespeare Studies (Minor) |
| SSPC | Anthropology (Minor) |
| SSPC | Applied Cultural Anthropology (Certificate) |
| SSPC | Cultural Resource Management (Certificate) |
| SSPC | International Studies (BA/BS) |
| SSPC | Latin American Studies (Minor) |

## QUINTILE 5

| Department Name | Program Name |
|---|---|
| Art & Art History | Digital Art & Design (Minor) |
| Art & Art History | General Studio Art (Minor) |
| Art & Art History | Photography (Minor) |
| Biology | Botany (Certificate) |
| Business | Business (Gen Ed / Service / Other) |
| Business | International Business (Certificate) |
| Business | Sustainability Leadership (Certificate) |
| Business / CPME | Business-Chemistry (co-Major) |
| Business / CPME | Business-Physics (co-Major) |
| CPME | Engineering Physics (BA/BS) |
| CPME | Physics (Minor) |
| CS | Computer Science (Minor) |
| CS | Computer Science (MS) |
| ES | Cultural Resource Management (BS) |
| ES | Environmental Studies (Minor) |
| ES | Geology (Minor) |
| Honors | Honors (Gen Ed / Service / Other) |
| Interdisciplinary Studies | Interdisciplinary Studies (BA/BS) |
| Library Instruction | Library Instruction (Gen Ed / Service / Other) |
| LLP | English & Writing (Gen Ed / Service / Other) |
| LLP | English Education (Minor) |
| LLP | German (Minor) |
| LLP | Literary Studies (Minor) |
| LLP | Professional Writing (BA/BS) |
| LLP | Professional Writing (Minor) |
| LLP | Special Studies (BA) |
| Performing Arts | Music (Minor) |
| Performing Arts | Music Composition (BA/BS) |
| Performing Arts | Theatre Arts (Gen Ed / Service / Other) |
| Performing Arts | Theatre Arts (Minor) |
| Performing Arts / Business | Music-Business (co-Major) |
| SSPC | International Studies (Gen Ed / Service / Other) |
| SSPC | International Studies (Minor) |

**New Programs**

| *Department Name* | *Program Name* |
|---|---|
| Business | Hospitality and Tourism (BAS) |
| Communications | Conflict Resolution (Certificate) |
| Communications | Conflict Resolution (Minor) |
| Education | Early Childhood Development (Minor) |
| EMDA | EMDA (BA/BS) |
| EMDA | EMDA (Gen Ed / Service / Other) |
| EMDA | EMDA (Minor) |
| LC | Learning Commons (Gen Ed / Service / Other) |
| LLP | French Language Teaching (MA) |
| Mathematics | Applied Mathematics (MS) |
| Mathematics | Statistics (Minor) |
| Performing Arts | Elementary General Music (BA/BS) |
| Performing Arts | Film Techniques (Minor) |
| Performing Arts | Music Performance (MM) |
| Performing Arts | Musical Theatre (Minor) |
| SSPC | Regional Studies & Applied Research (Certificate) |
| SSPC | Social Justice (Minor) |

**Data Files and Assumptions**

All emp files (Fall 12 - Oct 31, Winter 13 - Mar 28, Spring 13 - May 13)

Filters on above files:

  Primary jobs only

  Divisions related to Academic Affairs (CAS, SofE, SofB)

  Departments directly related to SCH production and supervisory reporting departments (see list at left)

  Jobs paid as: (Oct 31 file - either Sept or Oct, Mar 28 file - either Feb or Mar, May 13 file - either Mar, Apr, or May)

  Exclude researchers, grad assists, student workers, temps

  Include teaching, admin, classified

  Course and enrollment data includes only SCH produced by SOU employees (excludes ASC)

  Includes any employee job where 50% or more paid from budgeted operations

**Processing Notes**

Sort by division, department, discipline, employee category, employee name

Add subtotals by division, department, discipline, employee category

Add subtotal items on FTE, release FTE, headcount, appointment salaries

ELU's were calculated based on courses taught by professorial and professional faculty and accounts for:

  - standard lecture courses (1 to 1, i.e. 4 credit course = 4 ELU's)

  - lab courses (2 to 3, i.e. 3 contact hr lab = 2 ELU's)

  - capstone/reading in conf/thesis/research/etc courses 1/6 ELU per HC up to 6 then normal loading

  - team taught adjustments as per CBA

Discipline was included in this analysis if it offers masters, bachelor, or stand-alone minor

Home departments for employees from HR system can mischaracterize assignments (e.g. international studies)

Relied on FTE & appt salaries to be correct in HR

If FTE is overstated or ELU calculations are understating then the "deficiency gap" will be more pronounced.

AY appointment salaries taken from Oct 31 census file of HR data

| Divisions | Departments | Disciplines |
|---|---|---|
| College of Arts and Sciences | Art & Art History | Art & Art History |
| School of Business | Biology | Biology |
| School of Education | Business | Business |
| | Chemistry,Physics,Mat & Engineering | Chemistry |
| | Communication | Communication |
| | Computer Sciences | Computer Science |
| | Criminology & Criminal Justice | Criminology & Criminal Justice |
| | Education | Economics |
| | Environmental Studies | Education |
| | Health/Pe & Leadership | EMDA |
| | History / Political Science | English/Writing |
| | Language, Literature, & Philosophy | Environmental Studies |
| | Mathematics | Foreign Languages |
| | Performing Arts | Gender, Sexuality, & Women's Studies |
| | Psychology | Geography |
| | Social Sciences, Policy & Culture | Health & Phys Educ/Fitness |
| | University Seminar | History |
| | | International Studies |
| | | Mathematics |
| | | Native American Studies |
| | | Philosophy |
| | | Physics |
| | | Political Science |
| | | Psychology |
| | | Sociology/Anthropology |
| | | University Seminar |

**Selected Preliminary Findings**

1) Disciplines with low proportion of adjuncts include (Biology, Chemistry, Physics, ES, History/Poly Sci, Math, Econ, USEM)

2) Disciplines with high proportion of SCH generated by adjuncts include SofB, CS, SofE, For Lang, Music, Theatre, Psy)

3) Disciplines with big deficiency between expected ELU's and est. ELU's is highly correlated with disciplines of high proportion of SCH generated by adjuncts implying that ELU release is backfilled with adjunct workforce.

4) Faculty FTE distributions: CAS=80.5%, SofB=9.1%, SofE=10.5%

5) SCH distributions: CAS=85.4%, SofB=8.9%, SofE=6.7% (CAS is most efficient - uses 80% of the FTE to produce 85% of the SCH, SofE is least - uses about 10% of the FTE to produce 7% of the SCH)

6) Salary distributions: CAS=80.9%, SofB=10.3%, SofE=8.8% (CAS is most efficient - consumes 82% of the salary total to produce 85% of the SCH)

7) Faculty FTE per support FTE: CAS=6.48, SofB=8.1, SofE=4.23 (SofE is most dependent on support staff FTE and SofB is least dependent)

8) Faculty salary per support salary: CAS=$7.80, SofB=$6.25, SofE=$3.25 (SofE is most expensive in support needs and CAS is least expensive).  Stated another way… the percent of total salary devoted to support staff within the schools is: CAS=11%, SofB=14%, SofE=24%.

# Southern Oregon University

Academic Workforce Analysis



**Faculty FTE per Support FTE:**
College of Arts & Sciences = 6.48 FTE
School of Business = 8.05 FTE
School of Education = 4.23 FTE

**FTE* Totals by Discipline & Faculty Type**
AY 2012-13

*FTE amounts above do not adjust for sabbaticals taken.

Legend: ■ Teaching - Professorial  ■ Teaching - Professional  ■ Teaching - Adjunct (yr)  ■ Teaching - Adjunct (txt)  ■ Teaching - Other  ■ Support Staff  □ Totals

# Southern Oregon University
## Academic Workforce Analysis

**Appointment Salaries\* by Discipline & Faculty Type**
AY 2012-13

**Faculty Salary per Support Salary:**
College of Arts & Sciences = $7.80
School of Business = $6.25
School of Education = $3.25

Legend: Teaching - Professorial, Teaching - Professional, Teaching - Adjunct (yr), Teaching - Adjunct (txt), Teaching - Other, Support Staff, Totals

\*Salary amounts above do not adjust for sabbaticals taken.

# Southern Oregon University

Academic Workforce Analysis

## SCH Production by Discipline & Faculty Type
### AY 2012-13

**SCH % Distribution by School:**
College of Arts & Sciences = 85.4%
School of Business = 8.9%
School of Education = 6.7%



Legend: Teaching - Professorial · Teaching - Professional · Teaching - Adjunct (yr) · Teaching - Adjunct (txt) · Teaching - Other · Totals

Totals by discipline: Art & Art History 6923, Biology 8420, Business 13312, Chemistry 4431, Physics 4259, Communication 7910, Computer Science 4485, Crim & Crim Justice 6446, Education 10046, EMDA 1127, Env Studies 3816, Health PE & Ldrshp 8201, History 3482, Poly Sci 969, Eng & Writing 5871, For Lang 5940, Philosophy 2667, Mathematics 8648, Music 3968, Theatre Arts 6763, Psychology 12980, Economics 2474, GSWS 52, Geography 1545, Intl Studies 260, NAS 522, Soc/Anth 6669, USEM 7831

Groupings: CPME, HPS, LLP, Perf Arts, SSPC

**ELU Production by Discipline & Faculty Type**

AY 2012-13

ELU % Distribution by School:
College of Arts & Sciences = 83.3%
School of Business = 10.1%
School of Education = 6.6%

Legend:
- Professorial - est. of Actual ELU Produced
- Professional - est. of Actual ELU Produced
- Difference - Calculated ELU* minus Expected ELU**
- Difference - Excluding Sabbaticals

ELU deficits include release time granted to dept Chair assignments..
* Calculated = course based ELU production taken from F, W, Sp schedules of Professorial and Professional faculty.
** Expected ELU = (Professorial FTE x 36) + (Professional FTE x 44.5)

# Southern Oregon University

Academic Workforce Analysis

| Discipline | Employee Category | Fall 12 HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | Winter 13 HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | Spring 13 HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | AY Totals HC from all Courses* | SCH from all Courses | Avg Employee FTE | Appt Salary | Total Course Based ELU's (est)** | FTE Based ELU's | ELU Deficiency (est)* | ELU Deficiency After Sabbatical Adj |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Art & Art History | Teaching - Professorial | 318 | 1044 | 8.00 | 58.50 | 460 | 1682 | 8.00 | 88.33 | 438 | 1478 | 8.00 | 77.50 | 1216 | 4204 | 8.00 | 444,759 | 224.33 | 288.00 | -63.67 | |
| Art & Art History | Teaching - Professional | 111 | 444 | 0.80 | 14.00 | 99 | 396 | 0.80 | 14.00 | 84 | 336 | 0.80 | 10.00 | 294 | 1176 | 0.80 | 37,971 | 38.00 | 35.59 | 2.41 | |
| Art & Art History | Teaching - Adjunct (yr) | 54 | 210 | 1.00 | 0.00 | 49 | 194 | 1.00 | 0.00 | 64 | 245 | 1.00 | 0.00 | 167 | 649 | 1.00 | 41,022 | 0.00 | | | |
| Art & Art History | Teaching - Adjunct (txt) | 106 | 422 | 1.27 | 0.00 | 36 | 144 | 0.56 | 0.00 | 38 | 152 | 0.53 | 0.00 | 180 | 718 | 0.79 | 11,394 | 0.00 | | | |
| Art & Art History | Teaching - Other | 17 | 68 | 0.33 | 0.00 | | | | | 27 | 108 | 0.67 | 0.00 | 44 | 176 | 0.56 | 9,047 | 0.00 | | | |
| **Art & Art History** | | **606** | **2188** | **11.40** | **72.50** | **644** | **2416** | **11.0255** | **102.33** | **651** | **2319** | **11.00** | **87.50** | **1901** | **6923** | **11.14** | **544,193** | **262.33** | | **-61.26** | **-37.26** |
| Biology | 1 Teaching - Professorial Total | 1394 | 3621 | 10.00 | 127.33 | 1093 | 2426 | 10.00 | 116.83 | 956 | 2161 | 10.00 | 94.00 | 3443 | 8208 | 10.00 | 692,379 | 338.17 | 360.00 | -21.83 | |
| Biology | 2 Teaching - Professional Total | 105 | 0 | 0.50 | 12.00 | 92 | 0 | 0.74 | 12.00 | 85 | 0 | 0.74 | 10.00 | 282 | 0 | 0.66 | 23,311 | 34.00 | 29.36 | 4.64 | |
| Biology | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Biology | 4 Teaching - Adjunct (txt) Total | 165 | 0 | 0.75 | 0.00 | 117 | 212 | 0.73 | 0.00 | 0 | 0 | 0.00 | 0.00 | 282 | 212 | 0.50 | 5,660 | 0.00 | | | |
| Biology | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Biology** | | **1664** | **3621** | **11.25** | **139.33** | **1302** | **2638** | **11.47** | **128.83** | **1041** | **2161** | **10.74** | **104.00** | **4007** | **8420** | **11.16** | **721,350** | **372.17** | | **-17.20** | **6.80** |
| Business | 1 Teaching - Professorial Total | 618 | 2292 | 12.78 | 121.08 | 613 | 2398 | 10.45 | 117.35 | 578 | 2175 | 10.45 | 108.83 | 1809 | 6865 | 11.23 | 890,458 | 347.27 | 404.16 | -56.89 | |
| Business | 2 Teaching - Professional Total | 349 | 1128 | 4.75 | 58.50 | 350 | 1223 | 4.52 | 63.00 | 251 | 863 | 4.52 | 60.83 | 950 | 3214 | 4.60 | 246,105 | 182.33 | 204.51 | -22.17 | |
| Business | 3 Teaching - Adjunct (yr) Total | 148 | 592 | 2.64 | 0.00 | 154 | 600 | 3.64 | 0.00 | 168 | 612 | 3.75 | 0.00 | 470 | 1804 | 3.34 | 111,132 | 0.00 | | | |
| Business | 4 Teaching - Adjunct (txt) Total | 146 | 443 | 2.13 | 0.00 | 164 | 534 | 2.33 | 3.00 | 127 | 452 | 2.47 | 0.00 | 437 | 1429 | 2.31 | 20,600 | 3.00 | | | |
| Business | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 1.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Business** | | **1261** | **4455** | **22.30** | **179.58** | **1281** | **4755** | **21.94** | **183.35** | **1124** | **4102** | **22.19** | **169.67** | **3666** | **13312** | **22.14** | **1,268,295** | **532.60** | | **-79.06** | **-79.06** |
| Chemistry | 1 Teaching - Professorial Total | 948 | 1750 | 6.25 | 60.09 | 751 | 1329 | 6.33 | 70.64 | 693 | 1352 | 6.33 | 61.00 | 2392 | 4431 | 6.30 | 416,538 | 191.73 | 226.92 | -35.19 | |
| Chemistry | 2 Teaching - Professional Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Chemistry | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Chemistry | 4 Teaching - Adjunct (txt) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Chemistry | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Chemistry** | | **948** | **1750** | **6.25** | **60.09** | **751** | **1329** | **6.33** | **70.64** | **693** | **1352** | **6.33** | **61.00** | **2392** | **4431** | **6.30** | **416,538** | **191.73** | | **-35.19** | **-35.19** |
| Physics | 1 Teaching - Professorial Total | 422 | 948 | 3.00 | 32.83 | 415 | 955 | 3.00 | 33.83 | 433 | 988 | 3.00 | 31.33 | 1270 | 2891 | 3.00 | 226,800 | 98.00 | 108.00 | -10.00 | |
| Physics | 2 Teaching - Professional Total | 161 | 376 | 1.00 | 16.33 | 243 | 631 | 1.00 | 19.83 | 113 | 244 | 1.00 | 12.17 | 517 | 1251 | 1.00 | 54,522 | 48.33 | 44.49 | 3.83 | |
| Physics | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.43 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.14 | | 0.00 | | | |
| Physics | 4 Teaching - Adjunct (txt) Total | 14 | 28 | 0.13 | 0.00 | 74 | 89 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 88 | 117 | 0.04 | 1,000 | 0.00 | | | |
| Physics | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Physics** | | **597** | **1352** | **4.13** | **49.17** | **732** | **1675** | **4.43** | **53.67** | **546** | **1232** | **4.00** | **43.50** | **1875** | **4259** | **4.19** | **282,322** | **146.33** | | **-6.17** | **-6.17** |
| Communication | 1 Teaching - Professorial Total | 390 | 1494 | 6.00 | 53.56 | 394 | 1386 | 6.00 | 52.60 | 355 | 1380 | 6.00 | 58.40 | 1139 | 4260 | 6.00 | 377,298 | 164.57 | 216.00 | -51.43 | |
| Communication | 2 Teaching - Professional Total | 168 | 490 | 2.00 | 25.10 | 232 | 869 | 2.00 | 37.37 | 232 | 879 | 2.00 | 32.43 | 632 | 2238 | 2.00 | 106,245 | 94.90 | 88.98 | 5.90 | |
| Communication | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Communication | 4 Teaching - Adjunct (txt) Total | 68 | 272 | 1.07 | 0.00 | 175 | 660 | 1.60 | 0.00 | 131 | 480 | 1.47 | 0.00 | 374 | 1412 | 1.38 | 8,000 | 0.00 | | | |
| Communication | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Communication** | | **626** | **2256** | **9.07** | **78.65** | **801** | **2915** | **9.60** | **89.98** | **718** | **2739** | **9.47** | **90.83** | **2145** | **7910** | **9.38** | **491,543** | **259.47** | | **-45.53** | **-45.53** |
| Computer Science | 1 Teaching - Professorial Total | 186 | 743 | 4.00 | 40.67 | 150 | 600 | 4.00 | 36.67 | 166 | 632 | 4.00 | 43.83 | 502 | 1975 | 4.00 | 258,039 | 121.17 | 144.00 | -22.83 | |
| Computer Science | 2 Teaching - Professional Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Computer Science | 3 Teaching - Adjunct (yr) Total | 190 | 730 | 2.94 | 0.00 | 167 | 668 | 2.94 | 0.00 | 166 | 664 | 2.94 | 0.00 | 523 | 2062 | 2.94 | 135,900 | 0.00 | | | |
| Computer Science | 4 Teaching - Adjunct (txt) Total | 27 | 108 | 0.53 | 0.00 | 43 | 172 | 0.53 | 0.00 | 42 | 168 | 0.80 | 0.00 | 112 | 448 | 0.62 | 5,600 | 0.00 | | | |
| Computer Science | 5 Teaching - Other | 0 | 0 | 0.25 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.08 | | 0.00 | | | |
| **Computer Science** | | **403** | **1581** | **7.72** | **40.67** | **360** | **1440** | **7.47** | **36.67** | **374** | **1464** | **7.74** | **43.83** | **1137** | **4485** | **7.64** | **399,539** | **121.17** | | **-22.83** | **-22.83** |
| Crim & Crim Justice | 1 Teaching - Professorial Total | 404 | 1613 | 5.00 | 46.17 | 376 | 1501 | 5.00 | 56.33 | 280 | 1120 | 5.00 | 48.33 | 1060 | 4234 | 5.00 | 248,901 | 150.83 | 180.00 | -29.17 | |
| Criminology & Criminal Justice | 2 Teaching - Professional Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Criminology & Criminal Justice | 3 Teaching - Adjunct (yr) Total | 144 | 559 | 1.64 | 0.00 | 88 | 348 | 1.64 | 0.00 | 181 | 713 | 1.64 | 0.00 | 413 | 1620 | 1.64 | 66,762 | 0.00 | | | |
| Criminology & Criminal Justice | 4 Teaching - Adjunct (txt) Total | 19 | 76 | 0.80 | 0.00 | 98 | 392 | 1.07 | 0.00 | 31 | 124 | 0.80 | 0.00 | 148 | 592 | 0.89 | 6,800 | 0.00 | | | |
| Criminology & Criminal Justice | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Criminology & Criminal Justice** | | **567** | **2248** | **7.44** | **46.17** | **562** | **2241** | **7.71** | **56.33** | **492** | **1957** | **7.44** | **48.33** | **1621** | **6446** | **7.53** | **322,463** | **150.83** | | **-29.17** | **-17.17** |
| Education | 1 Teaching - Professorial Total | 810 | 2203 | 13.00 | 101.00 | 445 | 1390 | 13.00 | 67.50 | 589 | 2535 | 13.00 | 128.54 | 1844 | 6128 | 13.00 | 666,824 | 297.04 | 468.00 | -170.96 | |
| Education | 2 Teaching - Professional Total | 87 | 207 | 2.00 | 19.17 | 145 | 381 | 2.00 | 25.00 | 38 | 64 | 2.00 | 7.00 | 270 | 652 | 2.00 | 92,043 | 51.17 | 88.98 | -37.83 | |
| Education | 3 Teaching - Adjunct (yr) Total | 271 | 557 | 4.40 | 0.00 | 268 | 529 | 5.52 | 0.00 | 232 | 500 | 5.52 | 0.00 | 771 | 1586 | 5.15 | 187,884 | 0.00 | | | |
| Education | 4 Teaching - Adjunct (txt) Total | 39 | 116 | 1.50 | 0.00 | 390 | 974 | 4.47 | 0.00 | 45 | 127 | 2.13 | 0.00 | 474 | 1217 | 2.70 | 14,600 | 0.00 | | | |
| Education | 5 Teaching - Other | 85 | 129 | 0.33 | 0.00 | 3 | 9 | 1.00 | 0.00 | 150 | 325 | 1.00 | 0.00 | 238 | 463 | 0.78 | 8,835 | 0.00 | | | |
| **Education** | | **1292** | **3212** | **21.23** | **120.17** | **1251** | **3283** | **25.99** | **92.50** | **1054** | **3551** | **23.65** | **135.54** | **3597** | **10046** | **23.62** | **970,186** | **348.21** | | **-208.79** | **-148.79** |
| EMDA | 1 Teaching - Professorial Total | 37 | 108 | 1.00 | 6.17 | 10 | 39 | 1.00 | 0.83 | 5 | 20 | 1.00 | 0.83 | 52 | 167 | 1.00 | 57,843 | 7.00 | 36.00 | -29.00 | |
| EMDA | 2 Teaching - Professional Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| EMDA | 3 Teaching - Adjunct (yr) Total | 88 | 278 | 1.00 | 0.00 | 70 | 280 | 1.00 | 0.00 | 122 | 362 | 1.00 | 0.00 | 280 | 920 | 1.00 | 42,678 | 0.00 | | | |
| EMDA | 4 Teaching - Adjunct (txt) Total | 20 | 40 | 0.13 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 20 | 40 | 0.04 | 1,000 | 0.00 | | | |
| EMDA | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **EMDA** | | **145** | **426** | **2.13** | **6.17** | **80** | **319** | **2.00** | **0.00** | **127** | **382** | **2.00** | **0.83** | **352** | **1127** | **2.04** | **101,521** | **7.00** | | **-29.00** | **-29.00** |
| Env Studies | 1 Teaching - Professorial Total | 387 | 1239 | 5.00 | 41.50 | 376 | 1056 | 4.67 | 58.50 | 249 | 737 | 5.00 | 45.00 | 1012 | 3032 | 4.89 | 289,796 | 145.00 | 176.04 | -31.04 | |
| Environmental Studies | 2 Teaching - Professional Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Environmental Studies | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Environmental Studies | 4 Teaching - Adjunct (txt) Total | 101 | 100 | 0.87 | 0.00 | 72 | 96 | 0.47 | 0.00 | 274 | 588 | 1.11 | 0.00 | 447 | 784 | 0.81 | 6,500 | 0.00 | | | |
| Environmental Studies | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Environmental Studies** | | **488** | **1339** | **5.87** | **41.50** | **448** | **1152** | **5.14** | **58.50** | **523** | **1325** | **6.11** | **45.00** | **1459** | **3816** | **5.70** | **296,296** | **145.00** | | **-31.04** | **-19.04** |
| Health PE & Ldrshp | 1 Teaching - Professorial Total | 329 | 1035 | 5.00 | 43.50 | 313 | 935 | 5.00 | 38.17 | 253 | 666 | 5.00 | 31.17 | 895 | 2636 | 5.00 | 262,142 | 112.83 | 180.00 | -67.17 | |
| Health Phys Ed & Leadership | 2 Teaching - Professional Total | 376 | 944 | 4.00 | 41.00 | 255 | 675 | 4.00 | 21.33 | 348 | 756 | 4.00 | 29.17 | 979 | 2375 | 4.00 | 193,329 | 91.50 | 177.96 | -86.50 | |
| Health Phys Ed & Leadership | 3 Teaching - Adjunct (yr) Total | 59 | 94 | 0.78 | 0.00 | 119 | 216 | 0.78 | 0.00 | 114 | 211 | 0.78 | 0.00 | 292 | 521 | 0.78 | 31,995 | 0.00 | | | |
| Health Phys Ed & Leadership | 4 Teaching - Adjunct (txt) Total | 376 | 602 | 3.20 | 0.00 | 611 | 1048 | 4.34 | 0.00 | 578 | 1019 | 4.00 | 0.00 | 1565 | 2669 | 3.85 | 24,000 | 0.00 | | | |
| Health Phys Ed & Leadership | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Health Phys Ed & Leadership** | | **1140** | **2675** | **12.98** | **84.50** | **1298** | **2874** | **14.12** | **59.50** | **1293** | **2652** | **13.78** | **60.33** | **3731** | **8201** | **13.63** | **511,466** | **204.33** | | **-153.67** | **-129.67** |
| History | 1 Teaching - Professorial Total | 230 | 920 | 4.00 | 48.33 | 263 | 1052 | 4.00 | 48.17 | 229 | 916 | 4.00 | 44.50 | 722 | 2888 | 4.00 | 258,327 | 141.00 | 144.00 | -3.00 | |
| History | 2 Teaching - Professional Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| History | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| History | 4 Teaching - Adjunct (txt) Total | 32 | 128 | 0.53 | 0.00 | 42 | 158 | 0.53 | 0.00 | 77 | 308 | 1.07 | 0.00 | 151 | 594 | 0.71 | 4,000 | 0.00 | | | |
| History | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **History** | | **262** | **1048** | **4.53** | **48.33** | **305** | **1210** | **4.53** | **48.17** | **306** | **1224** | **5.07** | **44.50** | **873** | **3482** | **4.71** | **262,327** | **141.00** | | **-3.00** | **-3.00** |
| Poly Sci | 1 Teaching - Professorial Total | 84 | 335 | 2.00 | 20.67 | 78 | 310 | 2.00 | 20.33 | 81 | 324 | 2.00 | 20.50 | 243 | 969 | 2.00 | 119,898 | 61.50 | 72.00 | -10.50 | |
| Political Science | 2 Teaching - Professional Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Political Science | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Political Science | 4 Teaching - Adjunct (txt) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Political Science | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |

# Southern Oregon University

Academic Workforce Analysis

| Discipline | Employee Category | Fall 12 HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | Winter 13 HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | Spring 13 HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | AY Totals HC from all Courses* | SCH from all Courses | Avg Employee FTE | Appt Salary | Total Course Based ELU's (est)** | FTE Based ELU's | ELU Deficiency (est)* | ELU Deficiency After Sabbatical Adj |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Political Science** | | **84** | **335** | **2.00** | **20.67** | **78** | **310** | **2.00** | **20.33** | **81** | **324** | **2.00** | **20.50** | **243** | **969** | **2.00** | **119,898** | **61.50** | | **-10.50** | **-10.50** |
| Eng & Writing | 1 Teaching - Professorial Total | 270 | 1064 | 8.00 | 56.83 | 350 | 1289 | 8.00 | 57.83 | 384 | 1433 | 8.00 | 69.33 | 1004 | 3786 | 8.00 | 541,020 | 184.00 | 288.00 | -104.00 | |
| English/Writing | 2 Teaching - Professorial Total | 74 | 242 | 0.80 | 13.50 | 62 | 209 | 0.80 | 13.50 | 53 | 188 | 0.80 | 13.33 | 189 | 639 | 0.80 | 35,172 | 40.33 | 35.59 | 4.73 | |
| English/Writing | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| English/Writing | 4 Teaching - Adjunct (txt) Total | 105 | 345 | 1.07 | 0.00 | 86 | 344 | 1.33 | 0.00 | 83 | 317 | 1.07 | 0.00 | 274 | 1006 | 1.16 | 8,800 | 0.00 | | | |
| English/Writing | 5 Teaching - Other | 51 | 204 | 0.86 | 0.00 | 0 | 0 | 1.20 | 0.00 | 59 | 236 | 1.20 | 0.00 | 110 | 440 | 1.09 | 19,043 | 0.00 | | | |
| **English/Writing** | | **500** | **1855** | **10.73** | **70.33** | **498** | **1842** | **11.33** | **71.33** | **579** | **2174** | **11.07** | **82.67** | **1577** | **5871** | **11.04** | **604,035** | **224.33** | | **-99.27** | **-63.27** |
| For Lang | 1 Teaching - Professorial Total | 189 | 739 | 5.00 | 41.83 | 139 | 537 | 5.00 | 39.33 | 133 | 530 | 5.00 | 88.33 | 461 | 1806 | 5.00 | 322,605 | 169.50 | 180.00 | -10.50 | |
| Foreign Languages | 2 Teaching - Professorial Total | 67 | 268 | 2.00 | 28.17 | 92 | 368 | 2.00 | 28.00 | 75 | 300 | 2.00 | 24.00 | 234 | 936 | 2.00 | 95,922 | 80.17 | 88.98 | -8.83 | |
| Foreign Languages | 3 Teaching - Adjunct (yr) Total | 117 | 468 | 1.35 | 0.00 | 86 | 344 | 1.35 | 0.00 | 87 | 348 | 1.35 | 0.00 | 290 | 1160 | 1.35 | 57,924 | 0.00 | | | |
| Foreign Languages | 4 Teaching - Adjunct (txt) Total | 215 | 854 | 2.80 | 0.00 | 177 | 704 | 2.33 | 0.00 | 127 | 480 | 1.73 | 0.00 | 519 | 2038 | 2.29 | 22,000 | 0.00 | | | |
| Foreign Languages | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Foreign Languages** | | **588** | **2329** | **11.15** | **70.00** | **494** | **1953** | **10.69** | **67.33** | **422** | **1658** | **10.09** | **112.33** | **1504** | **5940** | **10.64** | **498,451** | **249.67** | | **-19.33** | **-19.33** |
| Philosophy | 1 Teaching - Professorial Total | 139 | 494 | 2.00 | 24.17 | 110 | 402 | 2.00 | 21.17 | 114 | 423 | 2.00 | 17.17 | 363 | 1319 | 2.00 | 108,477 | 62.50 | 72.00 | -9.50 | |
| Philosophy | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | 0.00 | |
| Philosophy | 3 Teaching - Adjunct (yr) Total | 67 | 268 | 1.00 | 0.00 | 72 | 288 | 1.00 | 0.00 | 88 | 352 | 1.00 | 0.00 | 227 | 908 | 1.00 | 43,533 | 0.00 | | | |
| Philosophy | 4 Teaching - Adjunct (txt) Total | 35 | 140 | 0.27 | 0.00 | 37 | 148 | 0.27 | 0.00 | 38 | 152 | 0.27 | 0.00 | 110 | 440 | 0.27 | 2,400 | 0.00 | | | |
| Philosophy | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Philosophy** | | **241** | **902** | **3.27** | **24.17** | **219** | **838** | **3.27** | **21.17** | **240** | **927** | **3.27** | **17.17** | **700** | **2667** | **3.27** | **154,410** | **62.50** | | **-9.50** | **-9.50** |
| Mathematics | 1 Teaching - Professorial Total | 427 | 1638 | 8.00 | 83.33 | 416 | 1612 | 8.00 | 76.00 | 419 | 1647 | 8.00 | 73.67 | 1262 | 4897 | 8.00 | 559,097 | 233.00 | 288.00 | -55.00 | |
| Mathematics | 2 Teaching - Professorial Total | 239 | 956 | 2.00 | 56.00 | 234 | 930 | 2.00 | 56.33 | 170 | 677 | 2.00 | 40.33 | 643 | 2563 | 2.00 | 132,894 | 152.67 | 88.98 | 63.67 | |
| Mathematics | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Mathematics | 4 Teaching - Adjunct (txt) Total | 146 | 584 | 1.53 | 0.00 | 103 | 412 | 1.32 | 0.00 | 48 | 192 | 0.88 | 0.00 | 297 | 1188 | 1.24 | 12,000 | 0.00 | | | |
| Mathematics | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Mathematics** | | **812** | **3178** | **11.53** | **139.33** | **753** | **2954** | **11.32** | **132.33** | **637** | **2516** | **10.88** | **114.00** | **2202** | **8648** | **11.24** | **703,991** | **385.67** | | **8.67** | **8.67** |
| Music | 1 Teaching - Professorial Total | 605 | 1096 | 8.91 | 58.83 | 495 | 797 | 8.00 | 48.58 | 455 | 634 | 8.00 | 46.00 | 1555 | 2527 | 8.30 | 539,262 | 153.42 | 298.87 | -145.45 | |
| Music | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Music | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Music | 4 Teaching - Adjunct (txt) Total | 128 | 270 | 2.37 | 0.00 | 175 | 477 | 2.93 | 0.00 | 209 | 608 | 2.38 | 0.00 | 512 | 1355 | 2.56 | 19,971 | 0.00 | | | |
| Music | 5 Teaching - Other | 14 | 28 | 0.48 | 0.00 | 15 | 30 | 0.48 | 0.00 | 14 | 28 | 0.48 | 0.00 | 43 | 86 | 0.48 | 50 | 0.00 | | | |
| **Music** | | **747** | **1394** | **11.76** | **58.83** | **685** | **1304** | **11.41** | **48.58** | **678** | **1270** | **10.86** | **46.00** | **2110** | **3968** | **11.34** | **559,283** | **153.42** | | **-145.45** | **-145.45** |
| Theatre Arts | 1 Teaching - Professorial Total | 599 | 1685 | 9.00 | 78.07 | 486 | 1299 | 9.00 | 70.90 | 627 | 1785 | 9.00 | 87.24 | 1712 | 4769 | 9.00 | 550,539 | 236.20 | 324.00 | -87.80 | |
| Theatre Arts | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Theatre Arts | 3 Teaching - Adjunct (yr) Total | 39 | 125 | 1.00 | 0.00 | 26 | 86 | 1.00 | 0.00 | 29 | 100 | 1.00 | 0.00 | 94 | 311 | 1.00 | 43,533 | 0.00 | | | |
| Theatre Arts | 4 Teaching - Adjunct (txt) Total | 136 | 424 | 2.07 | 0.00 | 209 | 678 | 3.13 | 0.00 | 126 | 384 | 1.80 | 0.00 | 471 | 1486 | 2.33 | 16,700 | 0.00 | | | |
| Theatre Arts | 5 Teaching - Other | 49 | 181 | 1.00 | 0.00 | 0 | 0 | 0.33 | 0.00 | 10 | 16 | 0.33 | 0.00 | 59 | 197 | 0.55 | 27,950 | 0.00 | | | |
| **Theatre Arts** | | **823** | **2415** | **13.07** | **78.07** | **721** | **2063** | **13.46** | **70.90** | **792** | **2285** | **12.13** | **87.24** | **2336** | **6763** | **12.89** | **638,722** | **236.20** | | **-87.80** | **-87.80** |
| Psychology | 1 Teaching - Professorial Total | 832 | 3102 | 14.00 | 124.50 | 638 | 2286 | 12.00 | 103.71 | 622 | 2306 | 12.00 | 91.13 | 2092 | 7694 | 12.67 | 955,675 | 319.33 | 456.00 | -136.67 | |
| Psychology | 2 Teaching - Professorial Total | 110 | 413 | 1.00 | 10.77 | 40 | 148 | 1.00 | 7.40 | 37 | 138 | 1.00 | 7.44 | 187 | 699 | 1.00 | 47,466 | 25.62 | 44.49 | -18.88 | |
| Psychology | 3 Teaching - Adjunct (yr) Total | 60 | 240 | 1.00 | 0.00 | 68 | 272 | 1.00 | 0.00 | 83 | 332 | 1.00 | 0.00 | 211 | 844 | 1.00 | 41,022 | 0.00 | | | |
| Psychology | 4 Teaching - Adjunct (txt) Total | 94 | 376 | 1.33 | 0.00 | 501 | 1862 | 4.67 | 0.00 | 431 | 1474 | 4.53 | 0.00 | 1026 | 3712 | 3.51 | 10,400 | 0.00 | | | |
| Psychology | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.67 | 0.00 | 12 | 31 | 0.67 | 0.00 | 12 | 31 | 0.45 | | 0.00 | | | |
| **Psychology** | | **1096** | **4131** | **17.33** | **135.27** | **1247** | **4568** | **19.34** | **111.11** | **1185** | **4281** | **19.20** | **98.57** | **3528** | **12980** | **18.62** | **1,054,563** | **344.95** | | **-155.55** | **-143.55** |
| Economics | 1 Teaching - Professorial Total | 229 | 916 | 4.00 | 40.50 | 115 | 450 | 4.00 | 16.83 | 192 | 762 | 4.00 | 41.00 | 536 | 2128 | 4.00 | 335,061 | 98.33 | 144.00 | -45.67 | |
| Economics | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Economics | 3 Teaching - Adjunct (yr) Total | 12 | 48 | 1.00 | 0.00 | 75 | 298 | 1.00 | 0.00 | 0 | 0 | 1.00 | 0.00 | 87 | 346 | 1.00 | 44,406 | 0.00 | | | |
| Economics | 4 Teaching - Adjunct (txt) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.27 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.09 | | 0.00 | | | |
| Economics | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Economics** | | **241** | **964** | **5.00** | **40.50** | **190** | **748** | **5.27** | **16.83** | **192** | **762** | **5.00** | **41.00** | **623** | **2474** | **5.09** | **379,467** | **98.33** | | **-45.67** | **-33.67** |
| GSWS | 1 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Gender, Sexuality, & Women's Studies | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Gender, Sexuality, & Women's Studies | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Gender, Sexuality, & Women's Studies | 4 Teaching - Adjunct (txt) Total | 13 | 52 | 0.27 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 13 | 52 | 0.09 | 2,000 | 0.00 | | | |
| Gender, Sexuality, & Women's Studies | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Gender, Sexuality, & Women's Studies** | | **13** | **52** | **0.27** | **0.00** | **0** | **0** | **0.00** | **0.00** | **0** | **0** | **0.00** | **0.00** | **13** | **52** | **0.09** | **2,000** | **0.00** | | **0.00** | **0.00** |
| Geography | 1 Teaching - Professorial Total | 172 | 495 | 2.00 | 24.67 | 128 | 407 | 2.00 | 17.67 | 143 | 559 | 2.00 | 21.33 | 443 | 1461 | 2.00 | 141,345 | 63.67 | 72.00 | -8.33 | |
| Geography | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Geography | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Geography | 4 Teaching - Adjunct (txt) Total | 21 | 84 | 0.27 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 21 | 84 | 0.09 | 2,400 | 0.00 | | | |
| Geography | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Geography** | | **193** | **579** | **2.27** | **24.67** | **128** | **407** | **2.00** | **17.67** | **143** | **559** | **2.00** | **21.33** | **464** | **1545** | **2.09** | **143,745** | **63.67** | | **-8.33** | **-8.33** |
| Intl Studies | 1 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| International Studies | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| International Studies | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| International Studies | 4 Teaching - Adjunct (txt) Total | 10 | 40 | 0.27 | 0.00 | 27 | 108 | 0.27 | 0.00 | 28 | 112 | 0.27 | 0.00 | 65 | 260 | 0.27 | 2,400 | 0.00 | | | |
| International Studies | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **International Studies** | | **10** | **40** | **0.27** | **0.00** | **27** | **108** | **0.27** | **0.00** | **28** | **112** | **0.27** | **0.00** | **65** | **260** | **0.27** | **2,400** | **0.00** | | **0.00** | **0.00** |
| NAS | 1 Teaching - Professorial Total | 46 | 184 | 1.00 | 9.00 | 33 | 129 | 1.00 | 12.67 | 53 | 209 | 1.00 | 12.00 | 132 | 522 | 1.00 | 56,889 | 33.67 | 36.00 | -2.33 | |
| Native American Studies | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Native American Studies | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Native American Studies | 4 Teaching - Adjunct (txt) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| Native American Studies | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **Native American Studies** | | **46** | **184** | **1.00** | **9.00** | **33** | **129** | **1.00** | **12.67** | **53** | **209** | **1.00** | **12.00** | **132** | **522** | **1.00** | **56,889** | **33.67** | | **-2.33** | **-2.33** |
| Soc/Anth | 1 Teaching - Professorial Total | 396 | 1533 | 7.00 | 62.24 | 318 | 1198 | 5.00 | 49.83 | 268 | 1002 | 5.00 | 41.17 | 982 | 3733 | 5.67 | 415,677 | 153.24 | 204.00 | -50.76 | |
| Sociology/Anthropology | 2 Teaching - Professorial Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | 0.00 | 0.00 | |
| Sociology/Anthropology | 3 Teaching - Adjunct (yr) Total | 217 | 864 | 2.33 | 0.00 | 207 | 824 | 2.33 | 0.00 | 113 | 446 | 2.33 | 0.00 | 537 | 2134 | 2.33 | 117,558 | 0.00 | | | |
| Sociology/Anthropology | 4 Teaching - Adjunct (txt) Total | 0 | 0 | 0.00 | 0.00 | 41 | 164 | 0.27 | 0.00 | 39 | 156 | 0.53 | 0.00 | 80 | 320 | 0.27 | | 0.00 | | | |
| Sociology/Anthropology | 5 Teaching - Other | 16 | 64 | 0.33 | 0.00 | 16 | 50 | 1.00 | 0.00 | 92 | 368 | 1.00 | 4.00 | 124 | 482 | 0.78 | 8,350 | 4.00 | | | |
| **Sociology/Anthropology** | | **629** | **2461** | **9.66** | **62.24** | **582** | **2236** | **8.60** | **49.83** | **512** | **1972** | **8.86** | **45.17** | **1723** | **6669** | **9.04** | **541,585** | **157.24** | | **-50.76** | **-14.76** |
| USEM | 1 Teaching - Professorial Total | 50 | 200 | 1.00 | 12.00 | 65 | 260 | 1.00 | 8.67 | 47 | 176 | 1.00 | 8.67 | 162 | 636 | 1.00 | 63,234 | 28.67 | 36.00 | -7.33 | |
| University Seminar | 2 Teaching - Professorial Total | 561 | 2244 | 9.00 | 104.00 | 487 | 1932 | 9.00 | 102.50 | 436 | 1711 | 9.00 | 97.81 | 1484 | 5887 | 9.00 | 414,360 | 304.31 | 400.41 | -96.19 | |
| University Seminar | 3 Teaching - Adjunct (yr) Total | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| University Seminar | 4 Teaching - Adjunct (txt) Total | 128 | 512 | 1.13 | 0.00 | 122 | 454 | 1.33 | 0.00 | 102 | 342 | 1.57 | 0.00 | 352 | 1308 | 1.34 | 8,500 | 0.00 | | | |

# Southern Oregon University

## Academic Workforce Analysis

| Discipline | Employee Category | Fall 12 | | | | Winter 13 | | | | Spring 13 | | | | AY Totals | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | HC from all Courses* | SCH from all Courses | Employee FTE | Course Based ELU's | HC from all Courses* | SCH from all Courses | Avg Employee FTE | Appt Salary | Total Course Based ELU's (est)** | FTE Based ELU's | ELU Deficiency (est)* | ELU Deficiency After Sabbatical Adj |
| University Seminar | 5 Teaching - Other | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | 0.00 | 0 | 0 | 0.00 | | 0.00 | | | |
| **University Seminar** | | 739 | 2956 | 11.13 | 112.00 | 674 | 2646 | 11.33 | 114.50 | 585 | 2229 | 11.57 | 106.48 | 1998 | 7831 | 11.34 | 486,094 | 332.98 | | -103.52 | -103.52 |
| | | | | | | | | | | | | | | | | | | | | | |
| **Support Staff** | **Support Staff** | | | | | | | | | | | | | | | | | | | | |
| Art & Art History | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Art & Art History | Classified Total | | | 1.00 | | | | 1.00 | | | | 1.00 | | | | 1.00 | 37,800 | | | | |
| Biology | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 31,518 | | | | |
| Biology | Classified Total | | | 3.00 | | | | 2.00 | | | | 2.00 | | | | 2.33 | 98,268 | | | | |
| Chem Phys Mat Engr | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Chem Phys Mat Engr | Classified Total | | | 2.00 | | | | 3.00 | | | | 3.00 | | | | 2.67 | 95,776 | | | | |
| Communication | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Communication | Classified Total | | | 1.00 | | | | 1.00 | | | | 1.00 | | | | 1.00 | 36,048 | | | | |
| Computer Science | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.25 | | | | 0.08 | 0 | | | | |
| Computer Science | Classified Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Criminology & Criminal Justice | Administrative Total | | | 0.75 | | | | 0.75 | | | | 0.75 | | | | 0.75 | 24,329 | | | | |
| Criminology & Criminal Justice | Classified Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| EMDA | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| EMDA | Classified Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Environmental Studies | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Environmental Studies | Classified Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Health Phys Ed & Leadership | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Health Phys Ed & Leadership | Classified Total | | | 1.00 | | | | 1.00 | | | | 1.00 | | | | 1.00 | 29,112 | | | | |
| History & Political Science | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| History & Political Science | Classified Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Lang Lit & Philosphy | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.48 | | | | 0.16 | 0 | | | | |
| Lang Lit & Philosphy | Classified Total | | | 0.00 | | | | 2.00 | | | | 2.00 | | | | 1.33 | 62,089 | | | | |
| Mathematics | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| Mathematics | Classified Total | | | 1.00 | | | | 1.00 | | | | 1.00 | | | | 1.00 | 39,588 | | | | |
| Performing Arts | Administrative Total | | | 1.91 | | | | 1.91 | | | | 2.40 | | | | 2.07 | 111,900 | | | | |
| Performing Arts | Classified Total | | | 4.00 | | | | 5.00 | | | | 5.00 | | | | 4.67 | 114,858 | | | | |
| Psychology | Administrative Total | | | 0.05 | | | | 0.00 | | | | 0.00 | | | | 0.02 | 0 | | | | |
| Psychology | Classified Total | | | 2.00 | | | | 2.00 | | | | 2.00 | | | | 2.00 | 65,628 | | | | |
| Soc Sci Policy & Culture | Administrative Total | | | 0.00 | | | | 0.00 | | | | 1.00 | | | | 0.33 | 0 | | | | |
| Soc Sci Policy & Culture | Classified Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| University Seminar | Administrative Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| University Seminar | Classified Total | | | 0.00 | | | | 0.50 | | | | 0.50 | | | | 0.33 | 0 | | | | |
| | | | | | | | | | | | | | | | | | | | | | |
| College of Arts & Sciences | 1 Teaching - Professorial Total | | | | | | | | | | | | | | | | | | | | |
| College of Arts & Sciences Dean's Office | 2 Teaching - Professional Total | | | | | | | | | | | | | | | | | | | | |
| College of Arts & Sciences Dean's Office | 3 Teaching - Adjunct (yr) Total | | | | | | | | | | | | | | | | | | | | |
| College of Arts & Sciences Dean's Office | 4 Teaching - Adjunct (txt) Total | | | | | | | | | | | | | | | | | | | | |
| College of Arts & Sciences Dean's Office | 5 Teaching - Other | | | | | | | | | | | | | | | | | | | | |
| College of Arts & Sciences Dean's Office | Administrative Total | | | 6.88 | | | | 6.00 | | | | 6.00 | | | | 6.29 | 489,057 | | | | |
| College of Arts & Sciences Dean's Office | Classified Total | | | 2.50 | | | | 2.50 | | | | 2.50 | | | | 2.50 | 79,164 | | | | |
| **College of Arts & Sciences Dean's Office** | | | | 27.09 | | | | 29.66 | | | | 31.88 | | | | 29.54 | 1,315,135 | | | | |
| School of Business | 1 Teaching - Professorial Total | | | | | | | | | | | | | | | | | | | | |
| School of Business Dean's Office | 2 Teaching - Professional Total | | | | | | | | | | | | | | | | | | | | |
| School of Business Dean's Office | 3 Teaching - Adjunct (yr) Total | | | | | | | | | | | | | | | | | | | | |
| School of Business Dean's Office | 4 Teaching - Adjunct (txt) Total | | | | | | | | | | | | | | | | | | | | |
| School of Business Dean's Office | 5 Teaching - Other | | | | | | | | | | | | | | | | | | | | |
| School of Business Dean's Office | Administrative Total | | | 2.00 | | | | 2.00 | | | | 2.00 | | | | 2.00 | 175,920 | | | | |
| School of Business Dean's Office | Classified Total | | | 0.75 | | | | 0.75 | | | | 0.75 | | | | 0.75 | 27,036 | | | | |
| **School of Business Dean's Office** | | | | 2.75 | | | | 2.75 | | | | 2.75 | | | | 2.75 | 202,956 | | | | |
| School of Education | 1 Teaching - Professorial Total | | | | | | | | | | | | | | | | | | | | |
| School of Education Dean's Office | 2 Teaching - Professional Total | | | | | | | | | | | | | | | | | | | | |
| School of Education Dean's Office | 3 Teaching - Adjunct (yr) Total | | | | | | | | | | | | | | | | | | | | |
| School of Education Dean's Office | 4 Teaching - Adjunct (txt) Total | | | | | | | | | | | | | | | | | | | | |
| School of Education Dean's Office | 5 Teaching - Other | | | | | | | | | | | | | | | | | | | | |
| School of Education Dean's Office | Administrative Total | | | 5.50 | | | | 5.50 | | | | 5.50 | | | | 5.50 | 298,536 | | | | |
| School of Education Dean's Office | Classified Total | | | 0.00 | | | | 0.00 | | | | 0.00 | | | | 0.00 | 0 | | | | |
| **School of Education Dean's Office** | | | | 5.50 | | | | 5.50 | | | | 5.50 | | | | 5.50 | 298,536 | | | | |

\* HC - Headcounts represent the total number of students in all the courses taught within the term by the employee category and therefore **is a duplicated count.**

\*\* Based on courses taught and also credits each discipline with 18 ELU release to reflect dept chair and/or discipline coordinator duties

**Southern OREGON UNIVERSITY**

# Conditions Update Report

**Presented to the Higher Education Coordinating Commission**
**December 10th, 2015**

# Introductions & Opening Remarks

## Introductions

- Dr. Roy Saigo, President Southern Oregon University

- Dr. Susan Walsh, Provost & Vice President for Academic and Student Affairs

- Mr. Craig Morris, Vice President for Finance & Administration

- Dr. Karen Stone, Associate Vice President for Academic Resource Management

- Mr. Mark Denney, Associate Vice President for Budget & Planning

- Mr. Christopher Stanek, Director of Institutional Research

# Decision Making Framework

## Provides the Support for Institutional Management

- Oversight by SOU Board of Trustees (orientation & AGB training Dec 2014 through June 2015)
  - Full Board (quarterly regular meetings)
  - Executive & Audit Committee (quarterly regular meetings)
  - Academic & Student Affairs Committee (monthly regular meetings)
  - Finance Committee (monthly regular meetings)

- Management within SOU's organizational structure
  - President's Cabinet
    - **Members:** Provost/VP Academic & Student Affairs, VPFA, VP Development, University Board Secretary, Director of Diversity & Inclusion, General Counsel, Chief of Staff/Director Government Relations
    - **Key Advisors:** AVP Budget & Planning, IR Director, CIO, Associate Provosts, AVP Retention/Enrollment, Athletics Director, Division Directors
  - Faculty and Student Senates
  - University Planning Board
  - Director & Division Councils

- Insight from the Presidents, Provosts, and VP for Finance & Admin Councils

- Collaboration with the Higher Education Coordinating Commission

# Mission Refinement & Accreditation

## SOU's Mission Defines the Core Themes
### <u>Student Success</u> • <u>Intellectual Growth</u> • <u>Responsible Citizenship</u>

- NWCCU accepted the mission and themes in 2011 and requires demonstrable mission fulfillment to confer full accreditation in 2016

- Mission refinement occurs after accreditation & informed by a strategic plan developed by SOU leadership and the Board of Trustees in consultation with the campus community

- SOU's niche within the portfolio of Oregon universities to be reflected within the strategic plan which will guide future mission refinement

- Any mission refinement must continue to recognize requirements imposed by the NWCCU's ongoing 7-year accreditation cycle

# Program Rationalization

## Current Program Portfolio is Shaped
## by our Comprehensive Liberal Arts Education

- Prioritization process, workforce analysis, and the retrenchment plan have guided recent adjustments to current program structure

- The Board of Trustees, Provosts Council, regional needs, and HECC review and approval provides oversight for new academic program offerings

- NWCCU assesses current programs' alignment with mission and core themes and evaluates engagement in planning for program resources

- Results of the 2016 accreditation review will contribute to future adjustments of the program portfolio and program assessment

# Core Themes & University Assessment

## Continuing Development of Systematic Program Review

- University Assessment Committee annually reviews all academic programs, including:
    - Pre and post evaluation of 1ˢᵗ year student performance
    - Assessment of components within the senior capstones
    - Comprehensive review and feedback for all programs' annual reporting

- Support Program Assessment Committee has a defined rubric to review outcomes for all administrative departments

- Program assessment software provides a structured database for coordinators to track adherence to core themes & program outcomes

- NWCCU's evaluation of each programs' contribution to mission fulfillment uses established standards, objectives and indicators

# Student Success & 40-40-20

## Increased Attention on Resident Student Success

- Recruitment and retention now prioritizes Oregon residents, such as:
  - Pirates & Bulldogs to Raiders
  - Jackson & Josephine Pledge
  - Innovation & Leadership Major
  - Bridge Program
  - Embedded recruiter in Portland area
  - Admission counselor fly-ins focus on Oregon high schools

- Professional advising has been expanded

- Student support systems have been expanded, including:
  - Enhanced student resource & advocacy centers
  - Additional student life programming
  - Added a mental health counselor
  - New student support network that operates as a council
  - Created the Office of Student Support & Intervention
    - Implemented SOU Cares and Financial Cares hired an additional case manager

- Ongoing regional collaboration – CC4A, RAC's, and SORS

- Center for Instructional Support & new curriculum design academy

- Success and completion informed by analytics

# Significant Organizational Change

## Integration of Academic & Student Affairs

- Eliminated VP for Student Affairs and the Dean of Students positions
- Added Associate VP of Enrollment & Retention
- Eliminated silos by connecting faculty to student affairs programming & services resulting in better communication between academic and student affairs
- Provided opportunity to create the office of student support & intervention

## Reorganization of Academic Programs

- Replaced college and school structure with academic divisions including a division devoted to UG studies and general education
- Replaced college and school deans with division directors
- Established directors' council resulting in more collaborative decision making and problem solving as well as improved accountability
- Added Associate VP of Academic Resource Management
- Associate VP manages course by course enrollments and aligns faculty loading & release with curricular needs
- Academic programs now engaged in recruitment and retention
- Benefits to students

# Conclusions & Challenges

## Moving Forward on Mission Refinement,
## Program Rationalization, Student Success, & 40-40-20

- **Conclusions**
  - Decision-making framework has been established
  - Committed to full implementation of the retrenchment plan
  - Current enrollment numbers and financial positions are positive
  - New leveraging of data resources and analysis
  - SOU Board of Trustees influential in the success of the institution

- **Challenges**
  - Managing ongoing enrollment including appropriate mix
  - Retention rate improvements
    - Increasing 1st year and 1st to 3rd year rates
    - Focusing on needs of student sub-populations
  - Degree attainment
    - Increasing number of resident student degree completers
    - Improving minority graduation rates and success
  - Aligning curricular and faculty resources with institutional needs

# Closing Remarks

- Destination or Regional
- What's being done differently now?
    - New decision framework
    - New organizational structures
    - New programs
- Current Status
    - Fund balance at 10%
    - Applications up 9%
    - Enrollment up 5% over projection
    - Retention is up
- Treat each student like they're our own

# Questions