



**PRELIMINARY FUNDING REQUEST TO THE HIGHER EDUCATION
COORDINATING COMMISSION (HECC) FOR THE 2015-17 BIENNIUM**

[SOUTHERN OREGON UNIVERSITY](http://www.southernoregon.edu)

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Context and Background for Southern Oregon University's Strategic Goals

Oregon has embarked on a major change in governance and planning for higher education. The Higher Education Coordinating Commission's (HECC) draft strategic plan identifies four principal goals:

- ***Broaden the pathways to our “40-40” education goal:*** encourage increased efficiency and a “more-smarter-faster” approach to achieving our 40-40 goals. More students moving more efficiently along better-organized pathways that lead to faster completion of certificates and degrees will raise the “return on investment” for both students and the state.
- ***Make the pathways accessible, affordable and supportive for students:*** accelerate student progress by straightening the pathways to certificates and degrees and helping students navigate the increasingly complex array of choices that confront them.
- ***“Steer” the higher education enterprise:*** challenge and support our state-sponsored institutions to meet the needs of students and the state with cost-effective, high-quality programs of training, study and research.
- ***“Cheer” the promotion of college completion and career readiness:*** engage Oregonians and under-represented communities to raise the profile of higher education, with the help of philanthropic, educational and community-based partners and support initiatives to meet the needs of first-time college students and under-represented populations.

Southern Oregon University

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 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, SOU must cut costs and narrow our 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.

SOU is a powerful economic engine of our local communities: over 85% of our graduates remain to work in Oregon. The most important contribution the university 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.

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.

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.

HECC Funding Request Assumptions and Background

The 2015-17 biennium will be the first time the Higher Education Coordinating Commission (HECC) will coordinate the public universities' funding requests. The HECC has provided preliminary guidelines for the March 31, 2014, requests. The final submission to the HECC that will be used to develop the consolidated funding recommendation to the Oregon Education Investment Board (OEIB) and the Governor will be modified in discussions with the HECC and in response to any guidance provided by OEIB and the Governor.

The State General Fund allocation to Southern Oregon University (SOU) for operations, that previously came through the Oregon University System and now will come through the HECC, is outlined in the following:

- Public University Support Fund, which provides the bulk of enrollment and incentive-based funding, but also includes some special service or support programs, such as the Health Professions Programs as well as several regional support program funds.
- Oregon University System State Programs, which for SOU is primarily the Engineering and Technology Innovation Council (ETIC) funding.

The unbundling of the Oregon University System (OUS) has generated additional costs for the remaining Technical and Regional Universities (TRUs). These biennium costs, totaling \$1,997,780 for each of the TRUs, represent the TRUs' share of the University Shared Services Enterprise (USSE) cost, the cost to replace services previously provided by the OUS Chancellor's Office, and governance costs relating to independent boards. Included in these costs is the assumption that \$4,686,467 in 5th Site biennium fund source will be reallocated from Oregon State University (OSU) and the OUS Chancellor's Office budget to the TRUs (\$1,171,617 each).

Currently PEBB charges OUS a composite (or average) rate for our monthly health insurance premium. As UO, OSU, and PSU become their own legal entities, they will be charged their actual health insurance premium costs based on number of employees, type of coverage (single, spouse, family, etc.), and type of plan (PEBB, Providence, Kaiser, etc.). The unbundling of the composite rate will cause each of the TRUs to be billed their actual premium costs. It is estimated that the cost of health insurance premiums for SOU will increase \$755,378 for the biennium.

In addition, the General Fund allocation to the Oregon University System has included funds to pay previously authorized state-paid debt service for campus projects. It is not yet clear what organization or State entity will manage those debt-service payments in the future, but funding must continue to be authorized to service this debt. For Southern Oregon University, funding includes a pass-through for the SELP loan, \$358,880 for the biennium.

The funding request for new capital projects has been a separate process previously coordinated by OUS. Capital funding requests can include requests for state-paid debt to match campus and gift funds and requests for institution-paid debt issued by the State. We have provided a concise summary of capital projects we are considering prior to the expected late-April timeline for formal capital requests to the HECC.

Finally, the funding received during the 2013-15 biennium to “buy-down” tuition rates, included in our request is the “roll up” cost for continuing the 2013-15 tuition “buy downs”.

Summary of Operating Funding Requests to the HECC

The proposed operating funding request are summarized in the table below.

Costs shown in thousands

Section 1: Development of the Public University Support Fund

A. To establish the cost of maintaining the status quo:

1. State resources to maintain similar levels of programs and learning outcomes:

Southern Oregon University’s allocation of the State General Funding for the 2013-15 Biennium is estimated to be \$29.2 million. The anticipated incremental costs to maintain the current programs and outcomes for Oregon students and stakeholders in each year of the 2015-17 biennium as well as strategic investment dollars are shown on the table below:

| <i>SHOWN IN THOUSANDS</i> | 2013-14 | 2014-15 | BIENNIUM | 2015-16 | 2016-17 | BIENNIUM |
|------------------------------|----------|-----------|-----------|--------------|--------------|---------------|
| STATUS QUO FUNDING | \$13,775 | \$ 15,597 | \$ 29,372 | \$ 19,622 | \$ 22,931 | \$ 42,554 |
| 5% ADDT’L INVESTMENT | | | | <u>981</u> | <u>1,147</u> | <u>2,128</u> |
| TOTAL INVESTMENT | | | | \$ 20,604 | \$ 24,078 | \$ 44,681 |
| 10% ADDT’L INVESTMENT | | | | <u>1,962</u> | <u>2,293</u> | <u>4,255</u> |
| TOTAL INVESTMENT | | | | \$ 21,585 | \$ 25,224 | \$ 46,809 |
| 25% ADDT’L INVESTMENT | | | | <u>4,906</u> | <u>5,733</u> | <u>10,638</u> |
| TOTAL INVESTMENT | | | | \$ 24,528 | \$ 28,664 | \$ 53,192 |

2. Itemize the major cost drivers behind the 2015-17 state resources request

The significant factors driving the increased funding required to maintain the defined “Status Quo” are shown in the table below with further detail provided.

| <i>SHOWN IN THOUSANDS</i> | 2015-16 | 2016-17 | BIENNIUM |
|--|----------------|----------------|-----------------|
| GENERAL FUNDING FROM PRIOR YEAR | \$15,597 | \$19,622 | \$29,372 |
| FACULTY INCREASES OR CHANGES | (1,333) | (624) | |
| NET SALARY INCREASE (EXCLUDING RETRENCHMENT) | 449 | 463 | |
| NET OPE COSTS | <u>783</u> | <u>966</u> | |
| NET SALARY AND BENEFITS | \$(101) | \$805 | |
| SERVICE, SUPPLIES AND OTHER @ 3.0% | <u>168</u> | <u>0</u> | |
| | \$15,664 | \$20,427 | |
| CAPITAL OUTLAY | 0 | 0 | |
| INCLUDED SHARED SERVICES & GOVERNANCE COSTS | 1,377 | 41 | |
| TUITION BUYDOWN (INCORPORATED INTO BASE) | 75 | 77 | |
| ETIC INSTRUCTIONAL SUPPORT | 203 | 211 | |
| PLANNED CONTRIBUTIONS TO RESERVE | <u>2,305</u> | <u>2,175</u> | |
| | \$3,959 | \$2,504 | |
| NET COST DRIVERS FOR STATUS QUO | \$19,622 | \$22,931 | \$42,554 |

- Changes in faculty costs, negotiated increases, and retrenchment reductions
 - Southern Oregon University has experienced a significant decline in state funding since the 2007-09 biennium and more recently in enrollment. The impact of these declines has required the University to engage in a retrenchment plan which has been reviewed and approved by the State Board of Higher Education. This retrenchment plan calls for the elimination of significantly low enrolled majors and a resulting reduction in faculty.
- Changes to personnel costs excluding Faculty
 - Southern Oregon University has made significant reductions in staffing over the past years, and therefore minimal administrative or classified staff reductions are included in the retrenchment plan.
- Net Other Personnel Expenditures
 - For Status Quo planning, an overall 3.2% increase to salary and other benefits was used, PERS and employee medical benefit plans continue to rise at higher rates significantly impacting costs.
- Svc, Supplies and other average increase of 3%
 - An overall rate increase of 3% for the biennium was used based on forecast guidance from the Higher Education Coordinating Commission (HECC).

- Shared Services and Governance Costs
 - The net cost of the unbundling of the Oregon University System is reflected in the cost to maintain the status quo.
- Contributions to Reserve
 - Southern Oregon University has invested significant effort and made some very difficult decisions reflected in the current retrenchment plan. The assumption was that these savings would not translate into an offsetting reduction in ongoing base funding, but would create a path to restoring financial stability and contribute to a reserve that has been eroded. Therefore those savings are represented as contributions to reserve, without which, the objective of ongoing financial stability cannot be achieved.

B. To establish the benefits of additional investment:

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.

| Outcome Measures – status quo | All Oregonians | Disadvantaged Groups | |
|--|----------------|----------------------|---------------|
| | | URM | Pell Eligible |
| # bachelor’s degrees awarded to Oregonians | 576 | 75 | 374 |
| # bachelor’s degrees awarded to rural Oregonians | 139 | 19 | 98 |
| # advanced degrees awarded to Oregonians | 175 | 17 | N/A |

3. What level will performance measures listed as “Completion” in the Achievement Compact with additional investment?

| Outcome Measures – strategic level investment 5% | All Oregonians | Disadvantaged Groups | |
|---|----------------|----------------------|---------------|
| | | URM | Pell Eligible |
| # bachelor’s degrees awarded to Oregonians | 605 | 79 | 393 |
| # bachelor’s degrees awarded to rural Oregonians | 146 | 20 | 104 |
| # advanced degrees awarded to Oregonians | 184 | 18 | N/A |

| Outcome Measures – strategic level investment 10% | All Oregonians | Disadvantaged Groups | |
|--|----------------|----------------------|---------------|
| | | URM | Pell Eligible |
| # bachelor’s degrees awarded to Oregonians | 634 | 83 | 411 |
| # bachelor’s degrees awarded to rural Oregonians | 153 | 21 | 108 |
| # advanced degrees awarded to Oregonians | 193 | 19 | N/A |

| Outcome Measures – strategic level investment 25% | All Oregonians | Disadvantaged Groups | |
|--|----------------|----------------------|---------------|
| | | URM | Pell Eligible |
| # bachelor’s degrees awarded to Oregonians | 720 | 94 | 468 |
| # bachelor’s degrees awarded to rural Oregonians | 174 | 24 | 123 |
| # advanced degrees awarded to Oregonians | 219 | 21 | N/A |

4. Briefly describe strategies employed to make outcomes from strategic investment levels

Strategies employed with strategic investment –

With a 5% increase in investment, the university would be able to add additional needed staffing to the advising and financial aid staff of 2.0 FTE each. Additional dollars would be added to remissions for students that show great financial need and are in danger of dropping out without additional non-load assistance.

A 10% increase in investment would allow, in addition to the staffing and remissions cited above, adding 9 faculty lines to replace retirements that have occurred in large programs that have the ability to serve more students – business, communications, criminology and criminal justice, and psychology – including additional on-line sections. This level of funding will also allow for expansion of the PEAK on-campus jobs program from 66 to 125 students.

A 25% increase in investment, in addition to those needs already expressed in the 5% and 10% scenarios, would allow for strategic development of several campus initiatives: expansion of the Pirates to Raiders program to at least three other local middle/high schools, expansion of the PEAK jobs program from 66 students to 300 students, full funding of the Raider Academy to serve 200 students annually, expansion of the Honors College cohort from 25 freshmen students to 50 freshman students annually with preference given to low income, first generation students, and expansion of the House Experience to serve all entering freshmen and transfer students. Another option would be to add an additional \$500,000 to \$1,000,000 general fund contribution to Athletics. Student athletes overall retain from 5-10% better than non-athletes and graduate at rates 10% greater than non-athletes

All of these efforts will substantially improve retention and completion rates especially with first generation, low income students. These initiatives are summarized in greater detail below.

5. How would outcomes change if SOU serviced more under-represented racial/ethnic, rural, and Pell eligible student?

| ENROLLMENT AND RETENTION STRATEGIES <i>\$ Shown in Thousands</i> | 5% invest | | 10% invest | | 25% Invest | |
|---|----------------|------------|----------------|-------------|-----------------|-------------|
| | \$ | FTE | \$ | FTE | \$ | FTE |
| Support Successful Entry to the University | | | | | | |
| • Expand Financial Aid staffing/remissions | \$800 | 2.0 | \$1,000 | 2.0 | \$1,000 | 2.0 |
| • Resource allocation model changes | \$600 | 0.0 | \$600 | 0.0 | \$1,000 | 0.0 |
| • Pirates to Raiders | \$200 | 1.0 | \$200 | 1.0 | \$1,500 | 3.0 |
| Improve persistence in Years 1 and 2 | | | | | | |
| • Expanded Advising | \$200 | 2.0 | \$500 | 5.0 | \$500 | 5.0 |
| • Raider Academy | | | \$250 | 1.0 | \$500 | 1.0 |
| • Honors College | | | | | \$1,000 | 1.0 |
| • House Experience | | | \$300 | 0.5 | \$1,000 | 3.0 |
| Move students to graduation | | | | | | |
| • Accelerated programs | \$200 | 1.0 | \$200 | 1.0 | \$800 | 2.0 |
| • Professional Experience and Knowledge (PEAK) | | | \$150 | 0.0 | \$1,000 | 0.0 |
| • Increase on-line programs | | | \$100 | 0.0 | \$800 | 1.0 |
| • Expanded Instructional Capacity | | | \$900 | 9.0 | \$900 | 9.0 |
| TOTAL INVESTMENT | \$2,000 | 6.0 | \$4,200 | 19.5 | \$10,000 | 27.0 |

Support Successful Entry to the University

Expansion of Financial Aid Staffing

Currently 80% of SOU students receive financial aid assistance. As college tuition continues to rise, the current staffing of financial aid counselors is not adequate to meet the needs of our students. An additional two FTE of counselors will allow for more timely response to student requests and help in retaining students that are financially challenged in meeting their educational goals. In addition to adding staff to support students, investments in software to better match students and make awards faster would be made.

- Additional students assisted in obtaining financial aid and increase enrollment:
 - 5% = 100 new students
 - 10% = 300 new students
 - 25% = 600 new students

Resource Allocation Model

If the state is to meet the goal of 40 percent of Oregonians having a bachelor’s degree or better, it needs the regional campuses to expand access to the rural populations they serve. Students in these populations are older, have families, have jobs, and are largely place bound.

The Resource Allocation Model needs to reflect the need to better fund undergraduate education especially in the first and second year where retention is the most problematic. First-generation and low-income students need additional resources overall to choose majors, understand arcane university language and systems, and leverage financial aid and budget appropriately. Without needing to target individual initiatives a re-working of the RAM for undergraduate and underserved populations would provide needed resources to this population of Oregon students.

- Additional students supported in entire spectrum of college preparation and enrollment
 - 5% = 100 new students
 - 10% = 300 new students
 - 25% = 600 new students

Pirates to Raiders

This innovative program has been piloted for two years in a partnership between SOU and the Phoenix-Talent School District, which has a 40% Hispanic student population. Pirates to Raiders targets eight-grade Hispanic students and follows them with support throughout their middle school and high school years. The program also works proactively with the parents of the students to help them understand the advantage of a college education, costs, financial aid, application, and finances. Students and parents sign a contract at the beginning of the program which enumerates the expectations of both the student and the family throughout the program.

SOU's goal is to expand this program to at least three additional schools (South Medford, Crater, and Eagle Point) and possibly to five more, including Ashland and North Medford. Hispanic enrollment at SOU has increased by 79% over the past five years (Fall 2008 to Fall 2013) and now comprises 9% of all students. If you consider only Hispanic undergraduate students, the percentage is higher with 9.5% of enrolled students. Adding non-admitted students in the Advanced Southern Credit program (dual credit between High School and College) an additional 2% students are affected for a total of 11.5%. By better preparing this demographic and by using remission dollars to aid students to take dual credit courses while in high school could significantly impact college readiness and subsequent retention. This would assist in meeting the 40-40-20 goal and guiding this growing demographic which has traditionally had low attendance in higher education to enrollment and completion of degrees.

Improve persistence in Years 1 and 2

Advising

One of the greatest components to student retention is effective advising. An advising task force developed in AY 2013-2014 recommended changes to insure consistent, timely, and effective advising, especially in the first and second years.

- Increase retention from 1st to 2nd year by:
 - 5% = 3% increase
 - 10% = 5% increase
 - 25% = 7% increase

Raider Academy (First Year Program for First Generation, Low-Income students considered at risk of retention and completion)

This is a transition program for entering freshmen who are traditionally at risk of not completing degrees. These students are generally one or more of the following: first generation, low income, or from racial groups that are not well represented in the current student population. This program brings students to campus two weeks before class begins to prepare them for college expectations in reading and writing, study skills, academic and personal resources, while also introducing them to campus offices and personnel that can assist in the transition to university level work. These students need additional support to navigate university systems, from help with declaring a major, understanding degree audits and graduation application, and, importantly, seeking financial advice and understanding personal budgeting. Since over sixty percent of SOU students are first generation students, this program would greatly assist in retention of first and second year students as well as meeting the state's 40-40-20 goal.

- 10% = improve retention from 67% 1st year to 2nd year to 75%

Honors College

SOU welcomed its first Honors College cohort of 28 students in Fall 2013. These exceptional students bring knowledge, skills, and expectations not only to their Honors College classes but to their major and minor classes as well. Not only a high expectation learning experience, the Honors College also connects students to the community through volunteer mentors from the business, arts, and social service community who work with students throughout their program on job related skills needed upon graduation. Additional investments will enable SOU to double the cohort size with special emphasis on local first-generation students who show exceptional academic ability. Additional funds would not only support the added cohorts but would also be used to expand the educational experience for students in the Honors College. SOU could then attract more students to the program.

- 25% = add an additional cohort each year with 25 each

House Experience

The "House Experience" is an initiative to increase retention from first to second and second to third years. The House curriculum provides an innovative alternative to general education. While adhering to approved general education learning goals, skills, and proficiencies, the House Experiences enables students to achieve outcomes through multi-year cohort- and problem-based learning that incorporates career mentoring, community partnerships, and real-world application and research.

The over-arching rationale for the House Experience is to build better, stronger, more productive and lasting relationships with students; to give students new and exciting opportunities to engage with what they are learning; to encourage faculty, staff and local community organizations to collaborate around the fundamental goals of higher education; and to revitalize the university teaching/learning culture by increasing a sense of adventure and excitement.

- 10% = improve 1st year to 2nd year retention from 67% to 75%
- 25% = improve 1st year to 2nd year retention from 67% to 80%

Move students to graduation

Accelerated Programs

SOU has two programs that accelerate completion of a Bachelor's degree. The Accelerated Baccalaureate (affectionately called *AccBacc*) is a three-year program that gives entering students credit for work done in high school (29-45 credits for general education and electives). The program is offered for select majors and does not allow students to change their major during the program. Currently fifty students are in the program. With increased marketing and staffing for program management, the program could be expanded to 200 students. This unique program for motivated students has received national attention with articles in the *Wall Street Journal* and *Los Angeles Times*.

Another SOU accelerated program is the Bachelor of Science in Innovation and Leadership (INL). This program is designed for working adults who have completed lower-division general education requirements. Offered in five-week courses in a hybrid format at the Higher Education Center in Medford, the program can be completed in eighteen months.

A significant feature of the Innovation and Leadership program is the use of Credit for Prior Learning for equivalent coursework completed in the work environment. This program could be offered on-line to serve the entire state and help address critical needs in providing leaders for today's workforce.

- 5% = one additional cohort of Innovation and Leadership (INL) program
- 10% = expand Accelerated Baccalaureate (AccBacc) from 50 to 100 students, add 2nd INL cohort
- 25% = Expand AccBacc from 50 to 200 students, add 2nd INL cohort

Professional Experience and Knowledge (PEAK)

SOU data show that students who work on campus retain at a much higher level than students who work off campus. The PEAK program provides SOU students with on-campus employment opportunities that encourage rich relationships with faculty and staff, foster professional curiosity and competency, and engender a sense of substantive contribution to the SOU community while providing students with financial support. New in 2014-15, PEAK has added 66 high-level student jobs that require and develop professional skills. So far all PEAK students have remained enrolled at SOU.

Three-quarters of funding for this program comes from the financial aid institutional remissions budget; the remaining quarter comes from the department or area that hires a PEAK student. It would be extremely beneficial to expand this program to at least 300 students.

- 10% increase = from 66 to 100 students
- 25% increase = from 66 to 300 students

Increase On-line Programs

Several of our largest majors (Business, Psychology, Criminology/Criminal Justice, Communications, and Education) could expand their on-line presence with additional faculty and staff resources. We would offer additional sections in our on-line degree programs as well as support additional sections of support course that serve on-line degrees. Additional sections of on-line general education courses would allow for fully on-line students to progress to graduation in a timely manner. The funding would support expanded software applications and fund additional support staff to assist both greater numbers of on-line students and faculty to convert face to face curriculum to on-line formats.

- 10% increase = expand participation by 5%
- 25% increase = expand participation by 15%

Expanded instructional capacity

A 10% increase in investment would allow adding 9 faculty lines to replace retirements that have occurred in large programs that have the ability to serve more students (including Business, Communications, Criminology/Criminal Justice, and Psychology).

Section 2: Development of Funding Requests that are not Formula-Driven

A. Resources to maintain current programs and outcomes:

Southern Oregon University's allocation of State General Funding for non-formula driven programs for the 2013-15 biennium was approximately \$1.6 M. While the true cost of supporting these programs is often well beyond the State support received, the request for continued funding to these programs is only the 3.2% inflation factor for salary and benefits, which is the primary cost component of many of these program. See the table below.

| PROGRAM | 2013-15 BIENNIUM | 2015-17 BIENNIUM |
|---|-------------------------|-------------------------|
| PUBLIC UNIVERSITY SUPPORT FUND – NON FORMULA | | |
| CAMPUS PUBLIC SERVICE PROGRAMS | \$194,134 | \$200,346 |
| SYSTEM WIDE EXPENSES / PROGRAMS | \$248,596 | \$256,551 |
| HEALTH PROFESSIONS PROGRAMS | \$746,754 | \$770,650 |
| STATE PROGRAMS | | |
| ENGINEERING AND TECHNICAL INNOVATION COUNCIL | \$400,820 | \$413,646 |
| | \$1,590,304 | \$1,641,194 |

Other Institutes and Programs

Campus Public Services (CPS):

Southern Oregon University receives funding specifically in support of public service entities such as the Small Business Development Center, Jefferson Public Radio, and Rogue Valley TV. As funding streams for these programs continue to be challenged, SOU must assume costs that exceed state support. The presence of these entities on the SOU campus contributes to the rich SOU student experience and directly supports vital state objectives concerning professional development and workforce needs.

System wide Expenses/Programs

Southern Oregon University receives funding for System-wide Expenses/Programs that are high profile programs and have been specifically targeted for their role in promoting 40/40/20. Those programs are:

- Statewide Assessments at system level, necessary to assess the effectiveness of the Oregon University System,
- Endowment Match – OUS endowment supports instructional equipment and related.
- Faculty Diversity – to encourage a diverse faculty body that supports diversity in the educational exposure of Oregon students
- Services to Students with Disabilities – recognizing the additional support students with disability require including sign interpreter services for those students requiring those services.
- ORBIS Library Consortium – The ORBIS library consortium supports all Campus libraries within OUS

Annually, SOU receives far less in funding to support these programs than the programs cost. For example, SOU spends over \$500,000 annually in support of students with disabilities, yet SOU receives only \$90,000 annually in support of this program. These programs are critical to the support of 40/40/20 yet must compete with other tuition-funded programs due to the mismatch between their true costs and funding received.

Health Professions Programs

SOU provides first- and second-year support courses for students that transfer into the Oregon Health and Sciences University (OHSU) BS in Nursing program cohort located at SOU. SOU students also major in Biology, Chemistry, and Health and Physical Education in preparation for postgraduate professional programs in Dentistry, Medicine, Occupational Therapy, Optometry, Pharmacy, Physician's Assistant, and Veterinary Medicine. Students major in Sociology, Psychology, and Human Services in preparation for postgraduate programs in Counseling and Social Work.

SOU offers the Master's degree in Mental Health Counseling, accredited by the Council for Accreditation of Counseling and Related Educational Programs (CACREP). This degree prepares professional counselors to provide extensive mental health services with public and private agencies as well as in private practice. Currently, only one cohort (20 students) can be accommodated per year. With additional support, two cohorts could be supported to meet state and regional workforce needs.

Together these programs prepare students to meet regional needs and provide pre-professional training to meet state workforce needs in the health sciences.

Collectively, the Health Professions Programs directly support the goal of 40/40/20 by preparing students to graduate with a BS in Nursing and meet one of Oregon's critical employment needs to the future.

State Programs:

Engineering and Technology Innovation Council (ETIC) Funding:

SOU has an excellent opportunity to continue development of computer forensics as a distinct feature of the BS in Computer Science. Located locally in the city of Central Point is a nationally accredited Computer Forensics Lab where SOU interns get hands-on experience with forensic techniques used today in law enforcement. Similarly the National Wildlife Forensics Lab, the only such facility in the United States, is located in Ashland and employs many SOU students as interns.

Together these two facilities present significant opportunities for student development and serve the local and regional needs of these employers. ETIC funding has supported the forensics concentration in the Computer Science degree as well as the Material Science concentration in the BS in Physics degree. While the material sciences program is being discontinued, additional investments in the Computer Science program will serve local students for jobs both regionally and state-wide.

It is recognized that ETIC funding is moving from the Public University Support Fund to the Oregon Education Investment Board (OEIB), which is currently slated to sunset in 2014-15; however, it is critical to recognize that, regardless of the funding source, these funds are used to fund instructional programs and faculty positions that support integration with industry and technology workforce needs. Failure to ensure ongoing support would be highly detrimental to Oregon’s 40/40/20 goal and to the goals of the HECC.

B. 2015-17 Capital Investments

| POTENTIAL CAPITAL FUNDING | | | | | | | |
|---------------------------|--------------|-----------------|------------|------------------|----------------|-------------------|--------|
| Capital Project | General Fund | State Paid Debt | | Campus Paid Debt | | | Total |
| | | XI-G Bonds | XI-Q Bonds | XI-Q Bonds | XI-F (1) Bonds | OUS Revenue Bonds | |
| Deferred Maint Britt Hall | | | \$4M | | | | \$4M |
| Cogeneration Biomass | | | \$12M | | | | \$12M |
| Suzanne Homes | | | \$20M | | | | \$20M |
| Capital Repair | | | \$2.6M | | | | \$2.6M |

Britt Hall:

Britt is third oldest building on campus and has the only large multi-purpose (150) classroom activity space. Seismic and HVAC upgrades to ensure safety and proper ventilation throughout facility. The restrooms on the second floor are not A.D.A. compliant and the “rounded” roof on the second floor is inadequate for lecture and classroom and needs a “suspended ceiling” installed which would improve acoustics.

Programs in Britt:

- Campus Student Admissions and Service Center for all student business activities.
- Home to International Programs and English as Second Language Programs
- Storage for Student Business and Academic Records
- OHSU School of Nursing Practicum Labs

Co-Generation Biomass:

Two of the four gas-fired boilers necessary to heat and provide hot water to campus are at end of life; one needs immediate replacement: the state boiler inspector will provide only one year “conditional” permit to operate. However, both boilers are of the same year and vintage. The hope is to replace these two boilers with modern biomass fueled boilers, which also offset the campus electrical consumption and cooling load in the summer through “absorption” chilling using steam from the boilers. Currently SOU needs all four boilers to heat the campus during winter days that are 20 degree or below. This biomass project would enable the campus to meet its carbon neutrality goals 20 years ahead of schedule and would provide simultaneously a laboratory and classroom for SOU’s Environmental Studies program.

Suzanne Homes:

If SOU is to meet 40-40-20 enrollment growth goals, the campus will need expanded instructional capacity. Suzanne Homes, a former residence hall, needs major seismic and mechanical upgrades but can also be renovated for classroom and study spaces as well as for faculty offices.

Capital Repair:

Capital repairs dollars are used to maintain the campus infrastructure on an annual basis. These monies are used annually for repairs and improvements to building shells, HVAC, and related services. They include items such as:

- Roof repairs and replacements
- Utility repairs and replacements (sewer, water, electrical, etc.)
- Concrete repairs (steps, sidewalks, exterior wall repairs, etc.)
- HVAC repairs and replacement (chiller replacement, building equipment repairs, fire alarm upgrades, etc.)
- ADA compliance projects