3. Institutional Overview

Southern Oregon University (SOU) has provided outstanding educational opportunities to students for over 140 years. The University is an important partner to businesses, government agencies, community organizations and other educational institutions in the region, as well as a major contributor to the economic, cultural and intellectual development of Southern Oregon and the state as a whole. The institution offers 37 academic majors, 38 minors, 11 certificate programs, 13 pre-professional programs, and 12 master-level graduate degrees. SOU is well known for its leadership in environmental sustainability, its partnerships with local arts and cultural providers, and its close engagement with the unique bio-region of Southern Oregon. With recently added programs in Wine Business, Outdoor Adventure and Expedition Leadership and Healthcare Management, the institution is expanding its slate of academic initiatives that serve local workforce needs, and with a new strategic plan, mission, vision and values that focus on expanding opportunities and success for all learners, customer service and innovative approaches to serving its constituents, the community and the region, SOU is positioned to occupy its role as a “university for the future.”

The strategic plan includes a new mission, vision, institutional values and strategic directions which ensure that the University retains the momentum gained over the past several years of careful growth and management, while articulating a clear vision for the future. Between Fall of 2016 and November 2017, President Linda Schott has lead the campus through a comprehensive and inclusive process of drafting each component of the plan, and focusing the University on the success of its learners, fiscal and environmental sustainability, customer service, and regional engagement. The University’s strategic planning process will finalize seven strategic directions, and will establish objectives, targets, and timelines for each.

The plan was developed using an iterative process – drafting, improving, and re-drafting SOU’s vision, values, mission statement and strategic directions, and collecting feedback and input from the campus community and external stakeholders along the way. The current version can be found in The SOU Plan section of the Strategic Planning website. The new mission and vision were approved for adoption by the SOU Board of Trustees in November 2017, along with core themes for accreditation.

While the University looks forward to implementing its new strategic plan, it can also look back at recent successes. Several years of careful monitoring of finances and enrollment figures, coupled with aggressive approaches to ensuring student enrollment, retention and completion have enabled the University to emerge from a three-year long retrenchment in sound fiscal and operational health. SOU has been focused and deliberate 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.

In addition to monitoring targets set during retrenchment to achieve cost savings and operational efficiencies, the University has also provided careful stewardship of its fiscal and governance structures in accordance with conditions established by the state’s Higher Educational Coordinating Commission (HECC). In 2014, upon assumption of the functions of the former state Board of Higher Education, the HECC required that SOU respond to clear and measurable expectations for metrics pertaining to enrollment, retention, fund balance and other operational aspects of the University. Pending final reporting to the HECC in December 2017, SOU anticipates confirmation of its success in meeting or exceeding all targets, and retention of its independent Board of Trustees.
In Fall 2017, SOU’s increase of 2.1% FTE over the prior year represented the greatest gain in FTE among all Oregon public institutions. This is especially noteworthy in light of data showing that nationally, enrollment declined by 1.4% in 2016 and is projected to fall again in 2017 according to the Research Center at the National Student Clearinghouse. Additionally, SOU’s 72% retention among first-time, first-year students represents a 4% increase over the prior year. The 2016-17 fall-to-fall retention rate of 78% also represents an increase for all admitted undergraduates. Among the most significant recent University initiatives are student recruitment and success strategies. These include:

- Enhanced recruitment and enrollment activities such as adding a Portland-based recruiter, focused minority community outreach and matriculation efforts (Pirates to Raiders, and Bulldogs to Raiders)
- Expanded high school counselor outreach promoting the access, affordability, and unique programs at SOU to support minority students;
- Comprehensive regional recruitment, such as SOU2YOU and Preview Day events, community college transfer receptions, and the high school counselor “fly-in” events
- Bridge, Accelerated Baccalaureate and Honors college programs that tailor the student experience from first-year to completion, based on need and academic profile.
- Implementation of an embedded “Student Success Coordinator” in each academic division to provide a central point of contact for student advising, career planning and academic risk assessment.
- Hired a financial aid communications coordinator to improve internal and external communications to students.
- Initiating a predictive analytics system developed to identify at-risk students relative to retention and academic challenges
- Enhanced tuition-assistance budget by 17%, adding $500K for a new total of $3.5M with $100K earmarked specifically for housing assistance.

In addition to strategic planning, the University continues to apply rigorous analysis to enrollment and retention strategies, faculty workload analysis, academic resource management, and curricular and program planning. Diligent management of faculty time and collaborative administrative processes have become the norm at the University evidenced by strong performance in all key operational areas.

4. Preface
a) Brief update on Institutional Changes since 2016 Year Seven Self-Evaluation Report

SOU’s accreditation was re-affirmed in March 2017 following submission of our Year Seven Self-Evaluation report and peer evaluation in Fall 2016. Since the site visit, the University has implemented or maintained key initiatives focusing on recruitment, retention, student success and student services, customer service, faculty resource management, and academic program development.

Administrative Personnel Changes

Craig Morris, Vice President for Finance and Administration, will retire in December, 2017. A national search for his replacement carried out in Fall 2017, concluded with the hiring of Greg Perkinson, retired Air Force Civil Engineer and, most recently, Program Manager of Boeing’s Consolidated Facilities, Operations and Maintenance Division, who will take over as VPFA on December 18, 2017. In August 2017, Dr. Greg Jones resigned as Director of the Division of Business, Communication and the
Environment. Dr. Katie Pittman was appointed Interim Director of the Division. Jeanne Stallman, Executive Director of Outreach and Engagement, was appointed Interim Director of Government Relations in October, 2017. Kristen Gast was hired as SOU’s Director of Financial Aid in February, 2017, and Staci Buchwald replaced departed Director of Housing Tim Robitz in July of 2017.

Academic Program Changes

In academic year 2016-17, three new programs were approved by SOU’s board of trustees, the Oregon Universities Provosts’ Council and the state Higher Education Coordinating Commission: the Wine Business Certificate, the Master of Outdoor Adventure and Expedition Leadership, and the Bachelor of Healthcare Administration. In fall of 2017, SOU entered into an agreement with Academic Partnerships to initiate a fully online Master of Business Administration, scheduled to matriculate its first cohort in April of 2018. This program offers an accelerated path to online learners in compressed 7-week terms with multiple cohort start points occurring each academic year. Aimed at continuing, adult, and professional or returning learners, the program is designed to be completed in as few as 16 months, and offers concentrations in general business administration, accounting, marketing, and business analytics. The University has reaffirmed its relationship with the Universidad de Guanajuato in Guanajuato, Mexico with the reinstatement of the Guanajuato cohort of the Master in Management Program for 2018.

Structural Changes

In February, 2016, SOU invited enrollment management consultant Roger Sullivan to campus to provide recommendations on enrollment, retention, student services and advising. Based in part on his analysis of SOU’s advising model and capacity and in part on analysis of data collected from the Division of Social Sciences after three terms of piloting a dedicated division advisor, SOU eliminated its professional advising center and instituted a decentralized divisional advisor model. This new model embeds a dedicated “Student Success Coordinator” in each academic division to provide a single point of contact for student advising, career development, faculty collaboration, and academic risk assessment. Building on the institution’s commitment to providing excellent customer service to all learners, staff and faculty, this model streamlines the structure of academic advising for students, ensures availability of a consistent, student-focused and division-specific resource, and provides collaborative contact for faculty and Division Directors. This new structure also enables a strong connection between students and academic and career counseling, aiming to increase retention and enhance the student experience by eliminating replication of services, reducing registration and success barriers, and identifying a clear path for students to progress. A national search was carried out in Summer of 2016 for the Student Success Coordinator team, with training and on-boarding completed in late fall.

Strategic Planning

Between October 2016 and November 2017, the University has engaged in a comprehensive, inclusive and strategic planning process under the direction of President Linda Schott, a core Strategic Planning Committee, a Strategic Planning Sub-Committee, the “Cabinet+3” (President’s Cabinet plus the Associate Vice Presidents for Budget and Planning and Academic Resource Management, and the Associate Provost), Project Manager Dr. Jon Lange, Professor Emeritus of Communication, and consultant Ginny Lang.
The process has included extensive study, consultation and collaboration with the entire campus community and key external stakeholders, including: a SWOT analysis, six town hall-style “Values Sessions,” seven “Professional Learning Communities” (research teams formed to examine seven trends in higher education’s future), and an interactive Expo to present and discuss the PLCs’ findings and SOU’s institutional response to current trends and concerns. Membership on all strategic planning groups, PLC research results, and a continually-updated progress report and timeline are found on the SOU Strategic Plan website.

Throughout the process, members of the campus community and other key stakeholders have been invited to visit the Feedback section of the strategic planning site to provide comments and input. Responses to the plan were also gathered via a survey distributed across campus in Summer 2017.

Capital Construction Projects

Two major capital construction projects will be completed in AY 17-18: The Lithia Motors Pavilion (which will house a state-of-the-art Student Recreation Center, the Athletics Department, Outdoor Programs, and academic programs Health and Physical Education and Outdoor Adventure Leadership), and the Theatre Arts building remodel, which updates and expands facilities that support SOU’s Theatre program, and will house the studios of Jefferson Public Radio.

b) Response to topics previously requested by the Commission

**Recommendation 1:** The evaluation committee recommends that Southern Oregon University (SOU) revisit its definition of mission fulfillment, and the planning for demonstrating mission fulfillment (Standards 1.A.2, 3.A.1, and 5.A.2).

**Response to Recommendation 1:**

SOU recently completed a comprehensive, collaborative and iterative strategic planning process that defines SOU’s institutional values, new mission and vision statements, and seven strategic directions. Three new institutional core themes and associated objectives and indicators were developed as part of this process. The SOU Board of Trustees approved each element of the new strategic plan in November 2017. The attached Ad Hoc report (see Appendix) documents the strategic planning process, defines the core themes, objectives and indicators of achievement, and articulates the University’s definition of mission fulfillment.

**Recommendation 2:** The evaluation committee recommends that SOU revise its objectives and indicators for the core themes to encompass both graduate and undergraduate programs (Standard 1.B.2).

**Response to Recommendation 2:**

The University has revised core themes for all aspects of the institution, including undergraduate academic programs, graduate academic programs, and non-academic (or “academic support” programs), as detailed in this report and that attached Ad Hoc report.

**Recommendation 3:** The evaluation committee recommends that the institution develop a plan to adequately fund the library for materials in order to support educational programs at the undergraduate and graduate levels (Standard 2.E.1).
Response to Recommendation 3:
SOU committed to an ongoing library budget increase by $12,000 beginning in FY18. They will be getting an annual 12,000 increase. We anticipate initiative increase requests to continue to grow the library’s funding by roughly 3% or so annually.

The budget increase has stabilized Hannon Library’s collection budget and allowed Hannon Library to avoid cutting electronic resources this fiscal year due to annual cost increases associated with inflation. Hannon Library has eliminated fees for inter-library loans (ILL), which will increase student and faculty access to materials.

Hannon Library is currently making use of a student-centered library services survey and a faculty-centered collections survey to identify new collections to purchase and/or license. ILL statistics are being used to identify high-volume requests. For the FY19 budget process, Hannon Library will factor in a permanent inflation adjustment to cover electronic resource inflation, as well as funding for additional electronic resources that our assessments identify as worthwhile.

Recommendation 4: As the University undertakes strategic planning, the evaluation committee recommends that care be taken to more closely connect the core themes with the planning effort, to make certain that the core themes are “consistent with the institution’s comprehensive plan” and are “aligned with and contribute to the achievement of the goals or intended outcomes of the respective programs and services (Standard 3.B.1 and 3.B.2). The committee further recommends that if there is any modification in the Core Themes, the University be mindful that Eligibility Requirement 3 requires that the Core Themes be approved by the Board of Trustees.

Response to Recommendation 4:
As indicated in this report and in the attached Ad Hoc report, SOU’s Board of Trustees approved the University’s new strategic plan, mission, vision, values, strategic directions and core themes in November 2017. Included in this plan are clear definitions and statements that indicate how and where the core themes, objectives, and indicators map to the strategic directions as “the intended outcomes of the comprehensive plan”. As work continues to develop the plan, specific targets for each objective within the strategic directions will be identified, as will plans for their achievement. Core theme objectives and indicators express the essential elements of the mission and are clearly developed to ensure ongoing assessment and achievements in mission fulfillment.

Recommendation 5: The evaluation committee recommends that the institution continue to expand the use of assessment data and document the assessment processes and results to inform academic and learning support planning and practices that lead to enhancement of student learning achievements (i.e. closing the loop). Furthermore, the committee recommends that all graduate programs be included in the assessment process (Standards 4.A.3 and 4B.2).

Response to Recommendation 5:
The University continues to refine and improve its institutional assessment processes, emphasizing the application of assessment data to improve achievement of student learning and overall institutional operations. Immediately following the approval of the new core themes and mission, work will commence to provide training and support to programs on developing and assessing outcomes, using data for ongoing improvement, and documenting assessment activities. Beginning in AY 17-18, following the recommendation of NWCCU and SOU’s own assessment planning, focused work on integrating
graduate programs began, under the direction of SOU’s Director of Assessment, Accreditation Liaison Officer, Graduate Council and the office of Institutional Research. Graduate program personnel will be trained in the use of TracDat, SOU’s assessment software program in Winter 2018, and each program’s outcomes and plans for assessment will be submitted by completion of the academic year.

5. Mission, Core Themes, and Expectations

a) Executive Summary of Eligibility Requirement 2: Authority

Southern Oregon University was founded as the Southern Oregon State Normal School in 1926, renamed as Southern Oregon College in 1956, Southern Oregon State College in 1975, and achieved status as a four-year university as Southern Oregon University in 1997. The University’s authority to operate and award degrees was conferred by Oregon’s governor in 1932 when Southern Oregon Normal School received full accreditation from the American Association of Teachers Colleges. Upon passage of Senate Bill 270 by the Oregon State Legislature in 2013, the seven public universities were empowered to operate independently of the Oregon University System and the Oregon State Board of Higher Education. SOU’s Board of Trustees assumed responsibility for governance of the University in July of 2015.

Executive Summary of Eligibility Requirement 3: Mission and Core Themes

SOU’s mission statement and core themes provide the foundation for all operations and program offerings of the University.

The alignment between strategic planning, mission, accreditation core themes, and the definition of mission fulfillment is detailed in the graphic above.
SOU’s Board of Trustees voted to approve and adopt the new mission and core themes on November 16, 2017. SOU’s new mission will become the guiding statement for the design and delivery of its degree programs, scholarship and creative activity of the faculty, and partnerships with the community, industry and government. The Board-approved mission statement now appears on the University’s strategic planning website.

b) Institutional Vision, Mission Statement, Values and Core Themes

**Vision**

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

**Mission Statement:**

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

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

**SOU’s Institutional Values**

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

The University’s previous five-year strategic plan (2009-2014) was followed by an institutional capacity report (2012), faculty workload analysis (2012), a program prioritization process (2013), a Delaware analysis (2013), and the retrenchment plan (2014). The current strategic planning process integrates information gleaned from these processes with the ongoing monitoring of enrollment and fiscal targets implemented as part of the HECC conditions requirements, and the priorities of the campus as determined during the comprehensive planning process initiated by President Schott in Fall 2016. The plan reflects significant input from the campus and external stakeholders around SOU’s strengths and opportunities, its position in the region and the state, and the future sustainability and growth of the institution.

Consisting of 31 faculty, administration, staff, trustee and student members, the core Strategic Planning Committee was comprised of members the University Planning Board and other key individuals representing the full range of campus constituencies. Seven “Professional Learning Communities” (PLCs), involving almost 90 members of campus and the community, were formed at the invitation of President Schott. The PLC teams were intended to assist with the strategic planning process by conducting research and preparing reports on seven key trends and developments affecting the future of higher education: Campus Learning Spaces, Economics of Higher Education, How Humans Best Learn, How our Learners Arrive, Learners of Tomorrow, Preparing Learners for Jobs That Don’t Yet Exist, and Technology and our Future. The results of the PLCs’ research were integrated into the formation of the mission and strategic directions, and informed the development of the full plan and core themes for accreditation.

SOU’s new plan also articulates seven strategic directions:

1. SOU will transform its pedagogy and curriculum (how and what it teaches) to enhance the success of its learners and graduates.
2. SOU will become an employer of choice and provide excellent service to all of its constituents.
3. SOU will actively model an environmentally sustainable campus and engage in collaborative research to promote an ecologically resilient bioregion.
4. SOU will create a diverse, equitable, inclusive community where learners flourish.
5. SOU will maintain financial stability and invest for institutional vitality.
6. SOU will develop physical and virtual environments in which all learners can thrive.
7. SOU will be a catalyst for economic vitality, civic engagement and cultural enrichment through ongoing collaboration with local, state, national, and global partners.

These strategic directions derive directly from the mission and form the basis for the core themes and the objectives and indicators identified to determine progress toward mission fulfillment, articulating “acceptable threshold[s] or extent of mission fulfillment” for each. The chart below illustrates the relationship between strategic planning and development and usage of the University’s core themes.
As the operational component of the strategic plan, the strategic directions express the commitments inherent in SOU’s mission through defined achievement metrics. Each strategic direction will include a set of goals, tactics, and suitable timeframes to allow the institution to track progress toward achieving the vision articulated by the plan. Importantly, specific targets and endpoints will also be generated for each strategic direction, defining not only the trajectory of progress for them, but also the destination or target metrics that will indicate achievement of the strategic plan.

Driven by the mission, the core themes express the institution’s commitment to continuous assessment, improvement, and fulfillment of the mission. They provide the means and the methods to ensure that institutional improvement is cyclical, ongoing, and authentic; in other words, that the primary elements of the mission can be measured in “meaningful, assessable and verifiable” ways. In some cases, objectives and indicators carry over from the previous assessment cycle and contribute to existing data sets gathered through institutional assessment of the previous core themes.

The iterative and inclusive process from which SOU’s strategic plan was developed ensured meaningful collaboration among all major constituencies (staff, faculty, administration, students, Board of Trustees and external stakeholders), and close connection between the core themes and the other elements of the institution’s comprehensive plan (see Fig. A). The three core themes reflect the collective intent of the strategic plan and express the “essential elements” from which specific objectives and meaningful indicators of achievement derive. Each of the three core themes expresses a component of the mission as a commitment, summarized as well, by the basic propositions that each underlines (student achievement, institutional improvement, community/regional/global engagement):

CT I: Use innovative curriculum, practices and technologies to achieve student learning and success ("make the student better");

CT II: Put our guiding principles into practice ("make the institution better");

CT III: Create opportunities and inspire the audacity to act upon beliefs and values in a broader context ("make the world better").
c) Core Themes

Core Theme I: Use innovative curriculum, practices and technologies to achieve student learning and success. ("making the student better")

As an educational provider that serves all of its constituents as learners, Core Theme I commits the institution to apply pedagogical concepts, tools and practices both to engage a wide range of learners, and to ensure meaningful learning opportunities. This core theme expresses SOU’s commitments to learners as “all persons seeking increased knowledge or skill including degree seekers, faculty, staff, and lifelong learners”; the institution as an “educational provider of choice”, and “a leading and preferred educational option for learners, whether they are enrolling for the first time, continuing their education, developing new skills, or changing careers” and a commitment to “student success, professional preparation, and civic engagement through service excellence, evolving technologies, and innovative curriculum.”

Core Theme I maps to Strategic Direction 1: SOU will transform its pedagogy and curriculum – (how and what it teaches) to enhance the success of its learners and graduates.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Indicator</th>
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<tr>
<td><strong>I.1 Critical Thinking:</strong> the comprehensive exploration of issues, ideas, artifacts and events before accepting or formulating an opinion (from AAC&amp;U value rubric)</td>
<td>I.1.1 Percentage of graduate and undergraduate students achieving proficiency as defined by institutional rubrics that assess writing, critical thinking, quantitative reasoning and information literacy</td>
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<td>I.1.2 Demonstrated growth in ability to apply critical thinking as assessed by comparative “matched pairs” sampling of first-year and senior writing</td>
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<td><strong>I.2 Professional Preparation:</strong> the development of written, oral and visual communication skills that reflect disciplinary knowledge, professional behaviors, and abilities needed to enhance career opportunities.</td>
<td>I.2.1 Achieve benchmark goal development of written ability across a variety of rhetorical contexts, as assessed by NSSE Benchmark: Level of Academic Challenge and assessment of oral communication using institutional rubric</td>
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<td>I.2.2 Percentage of students reporting gains in career preparation as assessed by NSSE Benchmark: First year to Senior-level transition</td>
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<td>I.2.3 Development and application of an institutional rubric for evaluation of student performance in internships, practica and/or applied capstone/graduate project experiences; derive and attain threshold levels of student performance in career settings</td>
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<td>I.2.4 Measure of percentage of students completing internships, practica and/or capstone experiences that allow them to apply knowledge and skills to professional settings and to meet defined and assessable learning outcomes</td>
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<td>I.2.5 Number of visits to Career Preparation services and Student Success Coordinators for career preparation</td>
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<td>I.2.6 Provide students with opportunities to gain competence and application</td>
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<tr>
<td>Objective I.1</td>
<td>Critical Thinking: perform the comprehensive exploration of issues, ideas, artifacts and events before accepting or formulating an opinion (from AAC&amp;U value rubric)</td>
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<td>To promote critical thinking among students, SOU has employed value rubrics developed by AAC&amp;U to measure student achievement in written communication throughout the previous seven-year accreditation cycle. Assessment of critical thinking has expanded over the past several years to include oral communication and quantitative reasoning, with the intent to build measures of visual and/or digital literacy into future assessment activities. Indicators are measured by data gathered from comparison of “matched sets” of student writing from first-year and seniors, oral presentations in classroom settings, and other campus events, and assessment of senior capstone or other significant writing experiences. Indicators correspond to the levels of achievement on scaled assessment instruments (where 1 is least proficient in areas that include construction of an argument and/or support of claims, and 4 is most accomplished) and demonstrate both student achievement on specific artifacts, as well as gains made from first-year “FUSE” essays (6-7 page first year research papers prepared at the conclusion of the first-year experience seminar), to the senior writing phase, thus indicating value-added gains in critical thinking.</td>
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Objective I.2:  
Professional Preparation: develop of written, oral and visual communication skills that reflect disciplinary knowledge, professional behaviors, and abilities needed to enhance career opportunities.

All students are encouraged to take part in practicum, capstone or internship opportunities that allow them to apply disciplinary knowledge and skills and professional dispositions in a workplace or other setting (I.2.4). Currently SOU has no institutionally applied rubric for evaluation student performance, although some academic programs have their own evaluation procedures, as do some internship and other sites. Indicator I.2.3 will be achieved when the institution has developed a suitable evaluation format and desired levels of performance for our students in their career preparation activities.

SOU’s Career Preparation office assists students with placement and preparation for these activities, and seeks some degree of assessment of the opportunities. Further, many programs require a professional internship, providing the opportunity to measure both the extent to which students are succeeding in these opportunities, and to better understand and assess the learning outcomes and assessment practices that they employ. Data from SOU’s Career Preparation (I.2.5) indicate the proportion of students who are seeking assistance with career preparation, and we anticipate that the implementation of our new Student Success Coordinators will also yield data, as part of their charge is to begin career planning within each student’s academic planning process as soon as they have determined their major.

Indicators I.2.1 and I.2.2 will gauge the extent to which students report gains made in the skills needed to succeed in professional settings, while data collected on student writing, oral communication, collaboration, and application of disciplinary knowledge will be generated from instructor-assigned assessments of Capstones, internships and other practical experiences (I.2.2 and I.2.3). Competent use of technology as a learning tool, and in preparation for professional opportunities are assessed by NSSE’s Learning with Technology Module (I.2.5)

Objective I.3:  
Civic Engagement: express and act upon the combination of knowledge, skills, values and motivation to make a difference in the civic life of our communities

Beyond simply offering opportunities for applied experiences, SOU seeks to assess the extent to which meaningful and measurable outcomes demonstrate our students’ knowledge and preparation to take on “real world” challenges in the community, region and globally. The University offers many opportunities to do so, including: Alternative Spring Break programs, Study Abroad and short-term study away work opportunities, curricular partnerships with community groups and social change agencies. These partnerships offer our students to apply the knowledge they gain in their studies and to collaborate with local partners. Indicators will include the number of opportunities and organizations/settings that students are involved in I.3.1), but also the quality of the experiences and the extent to which outcomes are defined and assessed (I.3.2)

Indicators of civic engagement will be measured through reporting of the percentage of students assessing their own experiences via NSSE and ETS instruments, which assess student learning and preparation (I.3.1 and I.3.4). In 2016, SOU became a partner institution for Educational Testing Services (ETS), piloting a new tool to assess civic engagement. We anticipate applying this survey more broadly once the pilot phase is complete. In addition, SOU’s University Studies (general education) program
incorporates Citizenship and Social Responsibility as one of its “learning strands”, as do the majority of SOU’s graduate programs, requiring that students:

- Understand and apply moral standards to individual conduct and citizenship through ethical inquiry, social awareness, and civic engagement; and
- Understand and apply the tools necessary for responsible participation in communities.

Measures of student achievement in these areas will be used as indicators of student involvement and quality of the experience of applying knowledge to enhance the civic life of communities (I.3.3).

Objective 1.4
Creativity and Curiosity: apply the ability and willingness to cultivate, synthesize, interpret and express ideas, images, or expertise in imaginative ways characterized by a high degree of innovation and divergent thinking.

Assessing creativity and curiosity will be new for many academic faculty and others at SOU. To Recognizing that creativity can be expressed in many formats, we look to resources such as AAC&U’s Creative Thinking Value Rubric which provides a means to assess attributes that are common to creative thinking across disciplines, whether expressed in a problem-solving exercise, a lab report, a mathematical equation, a research paper or a musical performance. Indicator 1.4.1 seeks student self-report of opportunities to engage in creative thinking from NSSE, while 1.4.2 and 1.4.3 will identify and apply direct measures of creativity and curiosity in academic work, as well as an inventory of the types of creative endeavors that students encounter in their time at SOU. As this objective is new and quite likely subject to refinement and revision, we look forward to informing NWCCU on progress and changes that may occur.

Core Theme II: Put our guiding principles into practice. (“making the institution better”)

Core Theme II speaks to the institutional imperative to operationalize the mission, vision and values and guiding principles. It encourages all members and programs of the University to adhere to the propositions made in the mission statement and to seek avenues to apply them in day-to-day operations.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Indicator</th>
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<tbody>
<tr>
<td>II.1 Efficiency and Sustainability: ensure efficient, sustainable and financially sound operating processes and procedures</td>
<td>II.1.1 Meet targets for delivery of academic programs: achieve targets for ratio of academic FTE to student credit hours</td>
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<td>II.1.2 Achieve efficiency of academic resources: achieve targets for ratio of total faculty FTE to instructional ELU (equivalent load unit); maintain optimal ratio for full-time permanent faculty to adjunct faculty</td>
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<td>II.1.3 Achieve efficiency of academic support programs through optimal ratio of non-academic program FTE to total SCH</td>
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<td>II.1.4 Achieve efficiency of administrative FTE to student credit hours, faculty headcount and programs</td>
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<tr>
<td>Objective II.1</td>
<td>Efficiency and Sustainability: ensure efficient, sustainable and financially sound operating processes and procedures.</td>
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<tr>
<td>II.1.5 Achieve efficient and appropriate measure of overhead costs (all areas within Budgeted Operations outside academic programs) per total SCH</td>
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<td>II.1.6 Number of academic programs achieving targeted annual contribution margin</td>
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<td>II.2 Service Excellence: SOU programs will provide excellent service for their constituents and other SOU programs</td>
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<td>II.2.1 Number of opportunities for professional development and training for staff and faculty</td>
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<td>II.2.2 Number of enhancements to customer service made by streamlining business procedures</td>
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<td>II.2.3 Percentage of responses on customer satisfaction surveys that indicate excellence</td>
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<td>II.2.4 Desired levels of staff satisfaction as assessed by data collected in the Great Colleges to Work (or other) appropriate survey</td>
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<td>II.3 Access and Equity: SOU will develop a campus climate in which constituents have equal, fair and appropriate access to content, locations, and opportunities</td>
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<tr>
<td>II.3.1 Number of opportunities for diversity advocate training for staff involved in recruitment; percentage of search processes undertaken according to diversity standards developed by Human Resources and the Diversity and Inclusion program</td>
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<tr>
<td>II.3.2 Achieve benchmarks percentage of employees participation in diversity and advocacy training</td>
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<td>II.3.3 Achieve target goals for recruitment and retention of employees from diverse communities</td>
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<td>II.3.4 Achieve targets for university infrastructure (physical and technological) to meet needs of diverse communities</td>
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<td>II.3.5 Achieve target percentages for courses within general education curriculum that engage learning outcomes of diversity and inclusion</td>
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<td>II.4 Institutional Improvement: SOU staff and programs will commit to constant quality improvement</td>
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<td>II.4.1 All graduate and undergraduate academic programs, and non-academic support programs on campus complete annual assessment report</td>
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<tr>
<td>II.4.2 All graduate and undergraduate academic programs, and non-academic support programs demonstrate commitment to ongoing improvement by providing evidence of planning and practices that lead to improvement</td>
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To achieve efficiency, sustainability and financial soundness, the University will continue its practice of setting targets for key measures and deriving strategies to achieve them. Objective II.1.1 includes setting a target for ratios of academic FTE to student credit hours that we believe will achieve optimal learning without excess cost. Objective II.1.2 requires setting and achieving a target for academic resources that will provide maximum efficiency of instructional resource use, as well as account for non-instructional faculty tasks and loading. Similarly, Indicator II.1.3 expresses the optimal mix of full-time faculty and term-by-term instructors, balancing the need for flexibility and adaptive faculty resources in instances like programmatic and personnel changes, while maintaining an ideal number of full-time faculty members.

Indicators II.1.3 and II.1.4 provide indication of the resource and capacity of administrative, non-academic and academic support programs relative to overall SCH and student need, again, with the goal of providing adequate learning and support opportunities for our students. Finally, Indicators II.1.5 and II.1.6 determine a university-level measure of expenses incurred by budgeted operations in order to support academic and other program needs on campus.

**Objective II.2**

**Service Excellence:** SOU programs will provide excellent service for their constituents and other SOU programs.

In order to become a “provider of choice” and to create a culture of service excellence, SOU will evaluate on an ongoing basis the efficacy and effort of its programs to deliver efficient and responsive service to students, staff and community members.

Professional development (Indicator I.2.1) is seen as a fundamental aspect of each SOU employee’s experience in the workplace, an opportunity for our staff to grow professional and to set and achieve goals, and a tool that ensures that the University’s constituents are served to the greatest extent possible. Programs that provide professional development, such as the Center for Instructional Support and Human Resources, offer workshops, training, mentoring and continuing education opportunities for administrators, faculty and staff. Academic programs are provided support via faculty Professional Development Grants and the Professional Development Activities Accounts that each permanent faculty member is guaranteed under the terms of SOU’s Collective Bargaining Agreement, and many academic support programs budget for professional development (conferences, webinars, continuing education opportunities, for example) for their staff. Numbers of staff members engaging in professional development and the type and outcomes of these opportunities (where appropriate) are expressed in Indicator II.2.1.

Mapping directly to one of the goals of Strategic Direction 2, “SOU will become an employer of choice and provide excellent service to all of its constituents”, Indicator II.2.2 will demonstrate efforts to achieve the goal of removing barriers to internal processes and business procedures, such as eliminating paper forms, reducing the numbers of signatures required for routine business processing, and fulfillment time for deliverables.

By implementing measures of customer satisfaction, both internally (for programs such as Business Services and Enrollment Services), as well as externally (via analysis of efficiency of web-based procedures for new admits and other external functions), SOU will seek to attain high levels of customer satisfaction, and will also enhance ability to apply data to ongoing improvement efforts (Indicator II.4.3).
The University administered the Great Colleges to Work for Survey in 2017, creating the opportunity to identify strengths and weaknesses in overall employee satisfaction, workplace experience, and extent to which employees derive satisfaction from their employment (II.2.4). Success in meeting this objective will also entail the University developing remedial approaches to problem areas, enhancing aspects of the University that are successful and/or in need of additional development, and addressing intangibles like morale and pride in one’s work. These data will provide a systematic way for the University to determine steps needed to create service excellence, and promote the institution as an “employer of choice” for all of its constituents.

Objective II.3
Access and Equity: SOU will develop a campus climate in which constituents have equal, fair and appropriate access to content, locations, and opportunities

SOU’s mission states that “we foster access, equity, inclusion and diversity in thought and practice” and includes “equity, diversity and inclusion” as institutional values. SOU’s commitment to these principles requires that we recruit and retain employees and students who identify as members of under-represented communities (Indicators II.3.2 and III.1.2). Meeting this objective will require that we examine all aspects of the University, from using principles of universal design to understand and take inventory of accessible physical spaces (II.3.4) on campus, to assessing the number and quality of intentional learning experiences that value and preserve the diversity of thought reflected among our students and prepare them to “work, live and communicate effectively across differences in order to thrive in an increasingly diverse world (SOU Strategic Direction 4).

Indicator II.3.5 refers to the number of course offerings in SOU’s general education curriculum that meet the goals of Strand J, Diversity and Global Awareness, and the extent to which learning outcomes are achieved in these courses. Additional data for this objective may also be generated by the results of SOU’s pilot of ETS’s cultural competence survey, which was initially administered in AY 2106-17 and is anticipated to be undertaken annually.

Working in conjunction with SOU’s Office of Human Resources, the Diversity and Inclusion program offers training for staff involved in recruiting and hiring procedures to ensure that institutional goals of access and equity are met in all searches. Diversity Advocates are trained to seek and identify bias, ensure that questions and search screening mechanisms reflect cultural and socio-economic diversity, and safeguard employment equity and affirmative action requirements for the institution. Indicator II.3.1 refers to the number of employees who receive this training and act as Diversity Advocates, while Indicator II.3.2 will be the percentage of employees who engage in some form of training offered around diversity, access and equity, such as Disability Access Resource Training, Sexual Harassment and Discrimination training, Ally training, and Bias Response training. In some cases, institutional requirements will always encourage full compliance (at a rate of 100%) however, realistic targets and strategies to achieve them will also be developed within this indicator.

Objective II.4:
Institutional Improvement: SOU staff and programs will commit to constant quality improvement.

All academic and non-academic (or academic support) programs at SOU conduct annual assessment reports as part of the University’s accreditation requirements to NWCCU (institutionally), and to external accreditors for seven of our academic programs. Since 2014, non-academic programs have mapped outcomes to the university’s previous core themes (which focused on student learning) and to
more specific academic support program outcomes (which connected to operational goals and achievements). Indicator II.4.1 will be assessed via continuation of these assessment activities on campus, including graduate programs, which remained in development at the time of submission of SOU’s Year Seven Report.

Indicator II.4.2 will require evidence that programs are applying assessment data to support continuous improvement. Often referred to as “closing the loop,” success in this area is indicated by the demonstrated use of assessment results to inform planning and operational practices that lead to programmatic improvement.

**Core Theme III: Create opportunities and inspiring the audacity to act upon beliefs and values in a broader context (“make the world better”)**

Core Theme III maps closely to Strategic Direction 7, which states, “SOU will be a catalyst for economic vitality, civic engagement and cultural enrichment through ongoing collaboration with local, state, national and global partners,” As a “regionally-engaged” university with a strong orientation toward community engagement, connected learning, and sustainability, SOU is committed to being a valued partner to community groups and entities.

Core Theme III addresses the responsibility of the university to provide its students with opportunities to develop and apply knowledge and skill-sets that enhance communities, as well as the sense of responsibility or “audacity” to believe that change can be effected through knowledge and practical action. A wide range of programs and curricular offerings support these goals, including the resource centers housed in Student Life (Multi-Cultural Resource Center, Queer Resource Center, Women’s Resource Center, Commuter Resource Center and Veterans’ Resource Office), Community Engagement and Connection, Outreach and Engagement, the Farm at SOU and the Center for Sustainability, the Small Business Development Center, Outdoor Programs, Campus Recreation. Various academic programs include connected learning as learning outcomes and require student-lead projects in the community.

This Core Theme also relates to the role of University in the community, as a driver of economic, intellectual and cultural development, and a contributor to the health and well-being of the community. It also acknowledges the importance of the health and well-being of the campus community.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Indicator</th>
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<tr>
<td>III.1 Diversity: learners understand, contribute to and thrive within a demographically and culturally diverse environment</td>
<td>III.1.1 Number of students participating in curricular or co-curricular programs that involve diversity</td>
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<td></td>
<td>III.1.2 Achievement of recruitment, performance and retention metrics for students from under-represented communities</td>
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<td>III.1.3 Number of campus events that promote and/or involve diversity-oriented outcomes</td>
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<td>III.1.4 Measures of positive experiences and/or avoidance or interruption of bias as reported in campus data collection process</td>
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<td>III.2. Economic vitality: SOU</td>
<td>III.2.1 Achievement of targets as derived from SOU’s Economic Impact Report</td>
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<td>III.2.2 Number of SOU graduates that stay in the community and gain or provide employment opportunities</td>
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<td>III.2.2 Gains in data provided by the Small Business Development Center measuring number and efficacy of small business partnerships with SOU</td>
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<td>III.3.1 Number of programs and SOU courses that integrate sustainability into learning outcomes</td>
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<td>III.3.2 Number of campus activities and partnerships that promote the practice and understanding of sustainability</td>
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<td>III.3.4 Percentage of students involved in campus-defined sustainability programs (eg. The Farm; Bee Campus; Arbor Day)</td>
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<td>III.3.5 Achievement of target on sustainability literacy test (SULI or other)</td>
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<tr>
<td>III.4.1 Number of campus events and curricular opportunities that provide cultural programming (arts, theatre, dance, music, digital arts or other)</td>
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<td>III.4.2 Number of community partnerships or collaborations with local/regional cultural entities</td>
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<td>III.4.3 Percentage of students engaging curricular or co-curricular opportunities that include cultural production as outcomes</td>
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<td>III.5.1 Visits to the Student Health and Wellness Center, SOU Cares reports which pertain to mental and physical concerns.</td>
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<td>III.5.2 Percentage of on-campus students participating in identity resource centers and other co-curricular programming intended to promote social inclusion</td>
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<td>III.5.3 Usage of campus recreation activities and facilities by campus community members</td>
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<td>III.5.4 Number of students enrolled in PEA (Physical Education Activities) courses</td>
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<tr>
<td>III.5.5. Reported numbers related to achievement of social inclusion and work-life balance from Great Colleges to Work For and/or other survey instruments.</td>
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**Objective III.1:**

**Diversity:** learners understand, contribute to and thrive within a demographically and culturally diverse environment
Indicators III.1.1 and III.1.3 are intended to help the University understand the extent to which students and others are experiencing diversity among the people with whom they work, interact and associate, and also in the content of events and programming that explore diversity as a construct around which understandings and skills can be developed. Accordingly, numbers of students participating in curricular or co-curricular programs that involve diversity provide a measure of how frequently and how many students are taking advantage of opportunities to explore diversity experientially, and a skill-set.

Along with equity and access, diversity is associated with the people who comprise the campus community, and the communities/identities that they represent (III.1.2). Student data help us understand who our students are, and how well they are being served by the University.

Indicator III.1.4 refers to campus processes for understanding and preventing bias and discrimination, including SOU’s Bias Response Team, and a program called “Raiders Don’t Hate” to empower community members to interrupt acts of bias or discrimination. Reporting data from the BRT track the numbers of Bias Reports, while self-report and disclosures to the Director of Diversity and Inclusion are tracked within Title IX reporting, and conduct and student intervention systems.

**Objective III.2**
**Economic vitality**: SOU programs, partnerships, and people position the University as a driver of economic development in the Rogue Valley

SOU strives to be a visible and positive partner to local businesses, and a contributor to the economic health of the region. In addition, close connections to local businesses provide venues for student learning, opportunities for employment, and relationships with the local community.

SOU’s economic impact on the region is the net result of activities for which the existence and the operation of the University are directly responsible. In a 2015 Economic Impact Study conducted by SOURCE (The Southern Oregon Research Center), these activities were identified and analyzed in terms of the demand that SOU brings to the region, and the economic activities that the University creates. Conducting this analysis on a regular basis will provide indication of SOU’s ongoing economic impact (Indicator III.2.1).

Indicator III.2.2 provides evidence of whether SOU graduates find work and stay in the region and/or contribute to the local economy by providing work. These data will be available through alumni surveys and analysis of LinkedIn profiles.

The Small Business Development Center (SBDC) at SOU supports emerging businesses and aspiring entrepreneurs by providing start-up assistance, feasibility analysis, business plan assistance, market and industry research and strategic planning support, among other services. The SBDC draws on the SOU community for expertise, and connects the University to local business development. Establishing targets for volume, scope and effectiveness of SBDC partnerships, and attaining measurement data will provide another aspect of the role SOU plays in supporting the local economy (III.2.3).

**Objective III.3**
**Sustainability**: Individual and institutional actions and educational activities articulate, support and advance sustainability efforts and achievements
Sustainability is a cornerstone of SOU’s identity and the University has received many accolades for its achievements in this area, including being designated the first Bee Campus and Tree Campus in the US; recognition as a Sierra Club “Cool School”; multiple awards from the Association for the Advancement of Sustainability in Education; and a recognized national frontrunner in offsetting of carbon and water use. Sustainability is also a prominent curricular theme, not only in the Environmental Studies and Policy program, but in several other undergraduate, graduate and co-curricular programs.

Indicators III.3.1 and III.3.2 will require an inventory of academic and non-academic program offerings that either promote understanding of sustainability, or advance the goal of sustainability in practical ways. These indicators will help us understand the degree to which sustainability is infused across campus and will be assessed via collection of data from programs; review of syllabi, student work products, assignments, and learning outcomes; and surveys administered to participants in co-curricular events. Similarly, indicator III.3.3 will require a census of students who participate directly in campus initiatives to promote sustainability (such as working on the SOU Farm) and evaluation of outcomes and accomplishments from this work. Achievement of sustainability literacy as a value-added gain of an SOU education will be determined by administration of the Sustainability Literacy Test (SULITEST) of the Higher Education Sustainability Initiative (HESI), or similar instrument (Indicator III.3.4).

Objective III.4
Cultural Enrichment: Provide opportunities to experience, create, and appreciate expressive and material forms of culture

Cultural expression and promotion of the creative arts are fundamental to several of SOU’s most popular academic programs, and we provide a comprehensive menu of offerings in theatre, music and digital media to the community each year. SOU also collaborates extensively with cultural producers from the region and around the world, including the internationally-known Oregon Shakespeare Festival (OSF), and the community of film professionals who comprise Southern Oregon Film and Media (SOFAM).

Indicator III.4.1 is the number of campus events and student learning opportunities that involve cultural expression and will be determined via attendance figures at SOU events (such as box office sales), as well as numbers of campus community members who work on these events. It will also require review of syllabi and learning outcomes from academic programs in the Oregon Center for the Arts and other academic divisions within which creative arts curriculum is offered. The relationships between SOU and local cultural providers will be determined for Indicator III.4.2, while scope and extent of the fulfillment of student learning outcomes will be determined from assessment activities for Indicator III.4.3.

Objective III.5
Well-being: Promote the convergence of physical and social well-being beyond the traditional concepts of health, and encourage a sense of belonging and social inclusion

Recognizing that health and well-being are fundamental to SOU as a community, indicators for this objective are associated with evidence that students and others are pursuing avenues to ensure their mental and physical health, participating in recreational and wellness activities, and seeking meaningful social connections. SOU offers a wide array of services and programs that promote well-being, including recreational and physical education activities and courses, health promotion programming, and services provided at the Student Health and Wellness Center and Student Support and Intervention. The “SOU Cares” reporting system administered by the Office of Student Support and Intervention yields
significant data regarding student physical, financial and psycho-social concerns, and is accessible to any member of the SOU community who identifies a student in need of support (III.5.1).

Social well-being, inclusion and peer support are among the outcomes identified for identity-based resource centers on campus, such as the Queer Resource Center, the Women’s Resource Center, and numerous student clubs and club sports. The extent to which students are engaged in co-curricular activities and programming demonstrate efficacy of our social inclusion programming (III.5.2). Indicators III.5.3 and III.5.4 assess usage of campus recreation and outdoor programs, and student enrollment data in PEA (Physical Education Activities) courses. It is difficult to draw a direct connection between use of campus recreation and physical education courses and intentional self-care, but the balance between mental and physical well-being is widely thought to be a strong indicator of a healthy campus. Faculty and staff self-reports of their own assessment of work-life balance and achievement of life goals are available via the Great Colleges to Work for Survey (III.5.5). Insights developed from these data points will enable SOU to gain understanding and develop strategies to promote the health and well-being of the institution.

6. Conclusion

The mission and core themes outlined in this report reflect the significant effort and aspirations of a campus that has come together over the past several years to achieve financial stability, solid enrollment and retention figures, and a collective vision for the next phase of its development. The current strategic planning process has been a robust exercise in identifying our strengths and weaknesses, as well as determining a path forward that articulates the essential identity of the University, its role in the community, state and world, and the achievements that we believe are possible for our students, staff, and community.

NWCCU’s response to SOU’s Year Seven Self-Evaluation noted the strength of our commitment to student success and acknowledged the significant work that the campus has done to remain vibrant and diligent in its. At the same time, it recognized the limitations imposed by extrinsic forces (such as changes in leadership and the shifting landscape of governance and funding structures in the state of Oregon), and the need to connect the mission and core themes, and assessment of mission fulfillment more tightly to our strategic plan and to make sure that the “core themes are consistent with the institution’s strategic plan.” The core themes and definition of mission fulfillment described in this report achieve those goals, but more importantly, articulate the important work done by this campus to determine a mission that inspires and guides its future, and engages the entire community in the effort to assess and ensure ongoing improvement is not only possible, but necessary. These core themes correspond closely to the “essential elements of the mission” and the objectives and indicators identify multiple data points to allow institutional understanding of achievements in fulfilling our mission. Careful monitoring of the efficacy of the data collection and thresholds for achievement will accompany the execution of this plan, as will thoughtful efforts to apply assessment results to continuous improvement.

With the strong support of the SOU Board of Trustees, faculty, staff, students and external stakeholders, the campus is well-prepared to move forward to advance forward-thinking student learning, holistic institutional improvement, and vital collaboration with the community.
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INTRODUCTION

On February 9, 2017, NWCCU reaffirmed Southern Oregon University’s accreditation following submission of SOU’s Year Seven Self-Evaluation and the visit of the Peer Evaluation Team in October, 2016. NWCCU required SOU to submit a Fall 2017 Ad Hoc Report to address Recommendations 1 and 2. It was determined that SOU was substantially in compliance with Commission criteria for accreditation, but in need of improvement in two areas: (1) definition of mission fulfillment, and the planning for demonstrating mission fulfillment (Standards 1.A.2, 3.A.1, and 5.A.2); (2) objectives and indicators for the core themes to encompass both undergraduate and graduate academic programs (Standard 1. B. 2).
RECOMMENDATION 1

The evaluation committee recommends that Southern Oregon University (SOU) revisit its definition of mission fulfillment, and the planning for demonstrating mission fulfillment (Standards 1.A.2, 3.A.1, and 5.A.2).

In Fall of 2016, Southern Oregon University embarked on a comprehensive strategic planning process under the direction of President Linda Schott and a Strategic Planning Committee comprised of 31 members of the campus community, including students, staff, faculty, administrators, Board of Trustees, and external stakeholders. Between October 2016 and November 2017, the campus has worked diligently to develop a new institutional mission, vision, values, strategic directions, and core themes for accreditation. This inclusive and iterative process involved significant campus participation and feedback. The SOU Board of Trustees approved the strategic plan and three institutional core themes for accreditation on November 16, 2017.

The University’s previous five-year strategic plan expired in 2014. Development of a new strategic plan was deferred pending completion of a 2-year interim presidency, and the three-year retrenchment process that initiated in 2014. The retrenchment plan served as the institution’s comprehensive planning document during that time. It was informed by several processes providing data on the University’s resource management, capacity, workload efficiency, student enrollment, and performance activities, including: an institutional capacity report (2012), a faculty workload analysis (2012), a program prioritization process (2013), and a Delaware Cost analysis (2013). Ongoing planning strategies are now carried out through:

- Data and outcomes derived from the retrenchment process
- Enrollment management
- Annual assessment of all academic and non-academic support programs
- Annual instructional cost and productivity analysis
- Analysis of faculty instructional and non-instructional time

The current strategic planning process integrates information gleaned from these processes with the ongoing monitoring of enrollment and fiscal targets implemented as part of the HECC conditions requirements, and the priorities of the campus as determined during the 2016-17 strategic planning work. The new plan is also built from significant input from the campus and external stakeholders around SOU’s strengths and opportunities, its position in the region and the state, and the future sustainability and growth of the institution.

A core Strategic Planning Committee was formed to guide the process, consisting of members the University Planning Board and other key individuals representing the full range of campus programs. Additionally, a Strategic Planning Sub-Committee and the President’s Cabinet and Leadership Team, provided leadership and direction for the larger Strategic Planning Committee. Seven “Professional Learning Communities” (PLCs), involving almost 90 members of campus and the community, were also formed at the invitation of President Schott. The PLC
teams provided research support to the process, preparing reports on seven key trends and developments affecting the future of higher education: Campus Learning Spaces, Economics of Higher Education, How Humans Best Learn, How our Learners Arrive, Learners of Tomorrow, Preparing Learners for Jobs That Don’t Yet Exist, and Technology and our Future. The results of the PLCs’ research were integrated into the formation of the mission and strategic directions, and informed the development of the full plan and core themes for accreditation.

**Interpretation of Mission Fulfillment**

The new core themes express the collective effort of the institution to identify meaningful and achievable indicators that it is fulfilling its mission. They derive directly from the mission and the seven strategic directions. Core Theme I focuses on student learning outcomes (both graduate and undergraduate); Core Theme II focuses on operational excellence and improvement, including planning for and assessing mission fulfillment; and Core Theme III focuses on SOU’s commitment to its constituent communities and the University community, itself. The graphic below demonstrates the relationship between the strategic plan and mission, and the core themes and planning for demonstrating mission fulfillment for accreditation.

SOU’s new mission will become the guiding statement for the design and delivery of its degree programs, scholarship and creative activity of the faculty, and partnerships with the community, industry, and government. All components of the strategic plan are available to the campus and external community via the University’s [strategic planning website](#).
Institutional Vision, Mission Statement, Values and Core Themes

**Vision**

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

**Mission Statement:**

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

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

**SOU’s Institutional Values**

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

**Strategic directions:**

1. SOU will transform its pedagogy and curriculum (how and what it teaches) to enhance the success of its learners and graduates.
2. SOU will become an employer of choice and provide excellent service to all of its constituents.
3. SOU will actively model an environmentally sustainable campus and engage in collaborative research to promote an ecologically resilient bioregion.
4. SOU will create a diverse, equitable, inclusive community where learners flourish.
5. SOU will maintain financial stability and invest for institutional vitality.
6. SOU will develop physical and virtual environments in which all learners can thrive.
7. SOU will be a catalyst for economic vitality, civic engagement, and cultural enrichment through ongoing collaboration with local, state, national, and global partners.

These strategic directions derive directly from the mission and form the basis for the core themes and the objectives and indicators identified to determine progress toward mission fulfillment, articulating “acceptable threshold[s] or extent of mission fulfillment” for each. The chart below illustrates the relationship between strategic planning and the University’s core themes.

As the operational component of the strategic plan, the strategic directions express the commitments inherent in SOU’s mission through defined achievement metrics. Each strategic direction will include a set of goals, tactics, and suitable timeframes to allow the institution to track progress toward achieving the vision articulated by the plan. Importantly, specific targets and endpoints will also be generated for each strategic direction, defining not only the trajectory of progress for them, but also the destination or target metrics that will indicate achievement of the strategic plan.

Driven by the mission, the core themes express the institution’s commitment to continuous assessment, improvement, and fulfillment of the mission. They provide the means and the methods to ensure that institutional improvement is cyclical, ongoing, and authentic; in other words, that the primary elements of the mission can be measured in “meaningful, assessable and verifiable” ways. In some cases, objectives and indicators carry over from the previous assessment cycle and contribute to existing data sets gathered through institutional assessment of the previous core themes. Starting in January 2018, steps to establishing specific targets for
each core theme indicator will commence, under the guidance of the University Assessment Committee, SOU’s Director of Institutional Assessment, the Graduate Council, the University Planning Board, and other campus entities as appropriate.
RECOMMENDATION 2

The evaluation committee recommends that SOU revise its objectives and indicators for the core themes to encompass both undergraduate and graduate academic programs (Standard 1.B.2).

As noted in our Year Seven report and in the evaluation committee’s recommendations, while we have achieved almost 100 percent compliance with annual assessment processes in undergraduate academic programs and non-academic or “academic support” programs, at the time that the Year Seven report was completed, assessment of graduate programs was still in the very early stages of development. Since that time, we have identified a submission and review process for graduate programs, paralleling the procedures implemented for undergraduate programs and academic support programs. Each program is required to conduct an annual self-study, assessing program and institutional objectives that map to the core themes, and examining their own quality and effectiveness in achieving targets that correspond to the institution’s mission and their own operational quality. These assessments are built on institutional rubrics that align with the core themes, and on narratives provided by each program on their planning and activities toward improvement. Once reports are complete, they are submitted and blind reviewed by the University Assessment Committee (undergraduate academics) and the Support Programs Assessment Review Committee (non-academic support programs), after which, feedback and follow-up discussion on next steps take place with the Director of Assessment. Beginning in academic year 2018-19, all graduate programs will participate in the same annual assessment cycle. The University Graduate Council will conduct the blind review of assessment reports and prepare responses to each program. For academic year 2017-18, while new mission, core themes, and indicators have been under development, Graduate Council has provided opportunities and guidance for graduate programs to identify program-specific learning outcomes and means of assessment. For programs with external accreditation, the Director of Assessment is assisting with aligning outcomes and data collection with institutional assessment themes.

As the process of integrating graduate programs into the University’s assessment procedures was predicated on the adoption of the new mission and core themes, we are now able to ensure that programmatic assessment and mission fulfillment are informed by data from graduate programs.
CONCLUDING STATEMENT

Southern Oregon University has complied with Recommendations 1 and 2 of the Fall 2016 Year Seven Peer Evaluation Report by completing a strategic planning process that revises the institution’s core themes, definition of mission fulfillment, and objectives and indicators for accreditation, and planning for mission fulfillment. The new core themes articulate outcomes that pertain to all operational and academic aspects of the institution, including graduate and undergraduate academic programs, as well as the non-academic support programs. Work to integrate and train graduate program staff and faculty on SOU’s institutional assessment procedures was initiated at the start of the 2017-18 academic year and will now be focused on the outcomes and indicators expressed in the new core themes.