

Year One Peer-Evaluation Report

Southern Oregon University

Ashland, Oregon

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*A confidential report of findings prepared for the
Northwest Commission on Colleges and Universities*

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Introduction

On behalf of the Northwest Commission on Colleges and Universities, the Evaluation Committee conducted a review of the Year One Report of Southern Oregon University. The committee reviewed the September 2011 Year One Self-Evaluation Report, the March 27, 2009 Focused Interim Report, and the March 2009 Focused Interim Report Appendices.

Southern Oregon University (SOU) characterizes itself as “*The Public Liberal Arts University of the West*,” and focuses on student learning, accessibility, and civic engagement. It primarily serves all of southern Oregon and the northernmost counties of California.

Assessment of the Institution's Self-Evaluation Report and Support Materials

The SOU Year One Self-Evaluation Report was prepared using the 2010 standards of the Northwest Commission on Colleges and Universities. The Self-Evaluation Report addressed Eligibility Requirements 2 and 3 and Standard One: Mission, Core Themes and Expectations. The Report was provided to the evaluation committee members in the timeline identified by the Commission in both paper and electronic forms.

The report was clearly written and the information presented appeared to be accurate and complete, addressed eligibility requirements and each component of Standard One, and provided the information needed by the evaluation committee to complete its review.

Topics Addressed as an Addendum to the Self-Evaluation Report

A Focused Interim Report was submitted in March 2009 and included as an addendum to the September 2011 Year One Self-Evaluation Report. The Focused Interim Report addressed five recommendations made by the Commission in its Full Scale Evaluation Committee Report of October 2007: finalize the new mission statement, develop a comprehensive educational assessment plan that results in the improvement of teaching and learning, establish a formal evaluation cycle of temporary and professional faculty, maintain adequate financial reserves to address the variability in operating revenues and expenses, and demonstrate a strategically guided financial planning process.

Prior Recommendation #1

The Committee recommends that SOU act quickly to finalize its new mission statement and to use this statement to develop an institutional strategic plan that addresses resource allocation, program development, and future initiatives of the University (Standard 1.A – Mission and Goals and Standard 1.B – Planning and Effectiveness).

A new mission statement was approved by the Oregon State Board of Higher Education in February of 2008 and has since been used to guide institutional strategic planning. In October 2009, SOU completed a five-year institutional strategic plan, *Building the New SOU: The Strategic Plan for Distinction and Sustainability 2009-2014*. In addition, SOU has completed a five-year Master Academic Plan to align planning at the School/College and Departmental levels with the mission and strategic goals of the University. Strategic planning has also been carried out for Student Affairs and fundraising at SOU.

SOU has finalized its mission statement and is using it to guide strategic planning at the institutional level, in academic areas, and in student affairs and fundraising.

Recommendation #2

The Committee recommends that SOU develop and implement comprehensive educational assessment plans and ensure that assessment results are used to improve teaching and learning (Standard 2.B – Educational Program Planning and Assessment, Policy 2.2).

SOU has established systematic methods for designing outcomes-based curricula and instituted a series of related methodologies, including curricular mapping, annual learning assessments, and a systematic program review process. SOU has also acquired an institutional data management system and an e-portfolio program and has developed institutional accreditation themes. These actions have enhanced SOU's ability to assess student achievement.

It is recommended that the institutional program review process be revised to improve alignment with institutional collection and analysis of student work.

Recommendation #3

To ensure the effectiveness and quality of all faculty responsible for the academic program, the Committee recommends that SOU implement a formal annual evaluation cycle for temporary (adjunct) and professional faculty to provide regular and systematic information on faculty performance (Policy 4.1 ☐ Faculty Evaluation, Standard 4.A.5).

SOU has shifted responsibility for adjunct faculty members from its Extended Campus Programs to the Schools and Colleges, and the hiring and evaluation responsibilities of adjuncts is now conducted fully by the academic departments. The process for evaluating adjuncts has been strengthened, as has the process for evaluating online teaching. Handbooks have been developed for adjunct faculty members and department chairs, and SOU has offered quarterly teaching and learning workshops for adjunct faculty and a monthly series of Chairs☐Institutes. These measures have improved the quality and effectiveness of adjunct faculty and strengthened the evaluation process.

Individual department chairs are currently responsible for identifying when each adjunct faculty member must be evaluated. No evidence of a schedule for evaluation of adjunct faculty members was provided in the Year One Self-Evaluation.

Recommendation #4

The Committee recommends that SOU maintain adequate financial reserves to address the variability in operating revenues and expenses in order to meet the mission and goals of the institution (Standard 7.8.7 ☐ Adequacy of Financial Resources).

SOU has undergone a retrenchment and reorganization process, improved efficiencies in its food services and campus utilities, and taken other steps to lower costs and increase its reserves. Institutional financial reserves at the end of the 2010-11 fiscal year were at 12 percent, well within the guidelines of 5-15% established by the Oregon State Board of Higher Education.

Southern Oregon University has addressed significant budget challenges and strengthened its financial position.

Recommendation #5

The Committee recommends that SOU demonstrate that financial planning is a strategically guided process that provides adequate operating and maintenance funds for current and future facilities and equipment (Standard 7.A.2 ☐ Financial Planning, Standard 8A.4 ☐ Instructional and Support Facilities, and Standard 8.C.2 ☐ Physical Resources Planning).

After careful study and consideration, SOU has adopted a new budget planning model that gives colleges and schools greater control over, understanding of, and accountability for their budgets. Under the Responsibility Centered Management (RCM) approach, departments now base budgets on contribution-margin guidelines, and the central administration focuses on institutional planning. In addition, a campus-wide budget committee has been established to strengthen the annual budgeting process and strategic investment decision-making. Communication processes are in place to share

information about the budgeting process. SOU has addressed the concerns raised by this recommendation.

Eligibility Requirements

Eligibility Requirements 2 and 3 were addressed in the report. Based on the information provided, Southern Oregon University meets these eligibility requirements.

Mission, Core Themes, and Expectations

Standard 1.A Mission

The mission of Southern Oregon University is as follows: *Southern Oregon University is an inclusive campus community dedicated to student success, intellectual growth, and responsible global citizenship.*

The mission statement is supplemented by the following commitments:

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.*

The mission statement is consistent with the role and purpose of a public liberal arts university serving its region, and the elements of the mission statement provide a basis for the development of core themes. The mission statement has been used to guide an extensive visioning and strategic planning process that results in a strategic plan for the university, a master academic plan, a marketing and recruitment plan, and a fundraising plan. SOU has aligned its mission, core themes, and strategic planning processes to guide the development of curricula and learning outcomes for its students, and SOU has integrated its planning efforts, core themes, objectives, and indicators of achievement to provide a consistent and integrated approach in supporting mission attainment.

Standard 1.B Core Themes

With broad participation from a wide range of stakeholders, three distinguishing characteristics were identified for SOU: *Connected Learning, Intellectual Creativity, and Sense of Place*. These characteristics are reflected in the three core themes for SOU: *student success, intellectual growth, and responsible global citizenship*. These core themes are embedded in SOU's mission statement and commitments and clarify expectations surrounding mission fulfillment. SOU has put into place a strong set of eight clearly identified objectives and 22 indicators of achievement/evaluation, most of which are direct indicators of performance.

Core Theme 1: Student Success ☐ *SOU students will be prepared for personally rewarding vocations and satisfying personal lives by developing ☐intellectual and practical skills.☐* Four objectives have been identified for this core theme. SOU has identified three direct and three indirect indicators to measure its level of achievements in student success.

Core Theme 2: Intellectual Growth ☐ *Students and faculty will extend and refine broad-based general knowledge, and specialized knowledge on one or more specific discipline(s).* Two objectives and three director indicators have been identified for this core theme.

Core Theme 3: Responsible Citizenship ☐ *Through academic and student affairs, students will be prepared for personal and social responsibility ☐ local and global.* SOU has established two objectives for this core theme, three direct indicators, three indirect indicators, and one descriptive measure of achievement.

The eight objectives identified by SOU provide a basis for evaluation of the core themes that have been established. Although some indicators are more robust measures of achievement than others, on the whole the indicators appear to adequately assess achievement for the three core themes established by SOU.

Summary

Southern Oregon University has an approved mission statement from which three core themes have been established. The university has identified objectives and indicators of achievement for each of the core themes and is developing the assessment system needed to determine current levels of performance and to assess each core theme objective and the extent of mission fulfillment.

Commendations and Recommendations

Commendations

1. Southern Oregon University is to be commended for the significant strides it has made in finalizing its mission statement and using it to guide strategic planning at the institutional level, in academic areas, and in student affairs and fundraising. Southern Oregon University has integrated its planning efforts, core themes, objectives and indicators to provide a consistent and integrated approach in support of its stated mission attainment (Standard 1.A.1).
2. Southern Oregon University is to be commended for strengthening its financial position by increasing financial reserves to 12 percent at the end of the 2010-11 fiscal year (Standard 2.F.1).

Recommendations

1. It is recommended that SOU establish a university-wide minimum standard of evaluating adjunct faculty members at least once every five years (Standard 2.B.6).