

Southern Oregon University

Access and Participation

Total Credit Enrollment

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Actual	5,469	5,478	5,505	5,161	4,989	5,002	4,836	5,082	5,104	6,443

Headcount of all students enrolled during fall term, regardless of course load

New Undergraduate Enrollment

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Actual	1,330	1,359	1,444	1,287	1,236	1,253	1,268	1,189	1,187	1,441

Headcount enrollment of newly admitted undergraduates, including both full- and part-time students and regular and extended studies enrollment

Explanation of Performance Trend

Implementing new recruitment strategies, strengthening retention, reorganizing enrollment management and academic programs, expanding on-line and distance education delivery, and developing more organized approaches to leveraging scholarships resulted in outstanding enrollments in fall 2010. Headcount increased 26%, and FTE increased 15% over 2009—the highest enrollment records in the University’s history. Unofficial winter 2011 end-of-term enrollment indicates a 10% increase in headcount and 6% increase in FTE over 2009.

Over 75% of our students are from Oregon. In 2009-10 we successfully conducted intensive and highly organized recruiting in-state, and in California, Hawaii, and Alaska. We created a new logo and images to assist with visibility and distinctiveness. We employed targeted websites and social media to reach prospective students. We connected with veterans by re-establishing ROTC and received national recognition this year for our program.

Additionally, with increased efforts to assist students in tutoring, disability services, and advising, freshmen retention increased to 70.4%, reflecting a continuing trend of improved retention rates. By comparison, SOU retained 62.8% of new freshmen in 2003.

Campus Initiatives and Significant Accomplishments

Fall 2010 represents an increase of 26% overall in students. These include increases over fall 2009 of:

- 10.8% in new freshmen,
- 36.2% in new undergraduate transfer students, and
- 20.1% in new graduate students.

Additionally, Hispanic enrollment saw a dramatic increase, up 46.3% this fall, helping to raise minority student enrollment overall to 12.5%, one of the most diverse fall terms in SOU history. Campus housing is filled.

To accomplish this dramatic increase in enrollment, several steps were undertaken in recent years, including:

- reorganized the Admissions Office and Enrollment Services Center;
- established an Enrollment Council to monitor the strategic enrollment plan;
- invested in international recruiting and strengthened partnerships with international universities to realize growth from markets in Mexico and in Asia;
- addressed the delay in recording non-admitted students into the term when course material is covered; and
- invested in converting courses and programs on-line, resulting in a 144% increase over 2008 offerings.

To better serve advanced high school students, we have two cohorts of Ashland High School students established in our Early Entry program and have established the first cohort of Medford High School students in a similar program at the Medford Higher Education Center.

Southern Oregon University

Student Progress and Completion

Freshman Retention

Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Actual	68.8%	69.2%	62.8%	65.2%	64.8%	65.9%	66.2%	67.6%	70.4%		
Targets			66.4%	70.8%	71.0%	72.0%	73.8%	74.0%	68.5%	70.0%	72.0%
			65.6%	69.0%	68.0%	69.0%	69.3%	69.5%			

Percentage of first-time, full-time freshmen who entered and returned to the same OUS institution for a second year

Explanation of Performance Trend

We have been experiencing a trend of approximately 1-3 percentage point increases in retention rates each year for the past five years. New initiatives in tutoring, housing, and academic advising are supporting steady incremental growth. We have new leadership for Success at Southern, a TRIO Student Support Services Program, and continue to receive federal grant funding to increase the college retention and graduation rates of our first-generation and academically challenged students as well as students with disabilities. The Learning Commons, established in fall 2010, coordinates many of these efforts and aids students with accessing resources to help them succeed.

Campus Initiatives and Significant Accomplishments

Several initiatives help to retain students:

- SOU's First Year Experience connects students with University faculty. University Seminar (first year experience) faculty are now trained to detect signs of struggling students and are provided options for student assistance.
- The new Learning Commons consolidates tutoring activities in the Hannon Library. Tutoring has been expanded to evening and weekend hours and is available at the Higher Education Center in Medford.
- The creation of an Institutional Research Office in 2009 has created resources for data-driven enrollment management and decision making.
- Each academic program is now being designed with specific learning outcomes, and programs annually assess student progress in learning.

We are implementing a more comprehensive approach to improving retention for academically at-risk students. The Academic Achievement Seminar, offered as a fall term option for incoming freshmen and transfer students, will now be required for any new students placed on academic warning during their first year. Additionally, tutoring is being added for courses that have high failure rates. These are the latest pieces to be added to the expanding Learning Commons. These new as well as existing efforts will help SOU meet its internal goal of exceeding 75% of freshman retained at SOU.

Freshman Retention within OUS

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Actual	74.1%	74.9%	71.2%	73.8%	71.7%	70.7%	71.7%	73.9%	74.3%

Percentage of first-time, full-time freshmen who return to any OUS institution for a second year

Graduation Rate

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Actual	32.3%	34.6%	36.0%	39.9%	37.7%	35.6%	35.7%	31.4%	30.9%

Percentage of first-time, full-time freshmen entering and graduating from the same institution within six years

Graduation Rate within OUS

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Actual	43.1%	45.3%	45.1%	49.6%	49.0%	46.4%	45.4%	40.7%	42.7%

Percentage of first-time, full-time freshmen entering this institution who graduate from any OUS institution within six years.

Explanation of Performance Trend

Most SOU students hold jobs, and 74% of admitted undergraduates receive some sort of financial aid. Many were hit hard by the economic downturn and by increased tuition that could not be sufficiently alleviated, even with additional institutional financial aid resources. Even with these challenges, more students graduated from SOU in spring 2010 than in any year since 2006.

Campus Initiatives and Significant Accomplishments

SOU has consistently backfilled the Oregon Opportunity Grant shortfall for qualified students, helping them to stay in school and progress to their degree. The SOU Foundation continues to make scholarship fundraising a priority and has increased scholarship donations by over \$950,000 since July 2009.

We revised academic advising requiring students to develop advising plans with a faculty or professional staff advisor for all years of enrollment. Junior and senior plans provide quarterly opportunities for upper-division student advising.

Additionally, a program has been introduced to help students resolve “incomplete” grades during spring breaks. We have greatly strengthened efforts to encourage students to enroll for fall term before they leave in June. New emphasis has been placed on our Accelerated Baccalaureate Program (3 years to graduate) for highly motivated students.

Southern Oregon University

Academic Quality and Student Success

The source survey for graduate satisfaction, graduate success, and internship data was indefinitely suspended in 2008 due to staff reductions within the Chancellor’s Office. As a result, data for the Class of 2009, previously scheduled for release in fall 2010, was not produced. Historical data are drawn from surveys of recent bachelor’s graduates (the *One Year Later* report series), conducted biennially by the Chancellor’s Office on behalf of OUS institutions.

Graduate Satisfaction

Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Actual		75.9%		79.5%		85.0%		N/A		N/A	
Targets				80.0%		81.0%		82.0%		83.0%	
				78.3%		79.0%		80.0%			

Percentage of recent bachelor’s degree recipients rating the overall quality of their educational experience as “very good” or “excellent” on a 5-point scale

Explanation of Performance Trend

In 2006, SOU initiated a focused effort to create long-term enrollment stability and student satisfaction. We benchmark our progress in part through administering the National Survey of Student Engagement (NSSE) and then addressing areas of weakness. We have also implemented integrated, intentional best-practices based on Project DEEP (Documenting Effective Educational Practices) that have supported student retention and engagement.

Campus Initiatives and Significant Accomplishments

Between 2006 and 2010, our performance on the National Survey of Student Engagement (NSSE) improved across all five benchmark areas:

- Level of Academic Challenge +5.5%
- Active and Collaborative Learning +5.5%
- Student-Faculty Interaction +25.6%
- Enriching Educational Experiences +6.2%
- Supportive Campus Environment +11.4%

In 2010, SOU met or exceeded comparison institutions in eight NSSE categories.

- Academic Challenge: SOU first-year students were more likely to say the “institution’s intellectual and creative work is challenging.”
- Active and Collaborative Learning: SOU first-year students and seniors were more likely to say they are “actively involved in their learning, individually and with others.”
- Enriching Educational Experiences: SOU first-year students and seniors were more likely to say they “take advantage of complementary learning opportunities.”

We have also systematically modified curricular and co-curricular activities using the pillars of our planning and branding, with emphases on intellectual creativity, connected learning—learning outside the classroom that broadens and deepens students’ skills and also connects them with employers and others in the region—and the central importance of our location in southern Oregon.

Graduate Success

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Actual		96.8%		96.5%		97.3%		N/A		N/A

Percentage of bachelor's degree recipients, surveyed approximately one year following graduation, who report that they are employed, continuing their education, volunteering, or working at home

Internships

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Actual				99.0%		98.6%		N/A		N/A

Percentage of bachelor's degree recipients who participated in at least one type of internship or experiential learning opportunity

Student to Full-Time Faculty Ratio

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Actual	23.2	23.2	24.7	23.0	21.3	20.5	21.1	21.9	20.8	24.3

The ratio of fall FTE enrollment (calculated as full-time plus one-third part-time headcount) to full-time faculty headcount

Explanation of Performance Trend

Community-Based Learning (CBL)—including internships, practica, capstone projects, experiential learning, and civic engagement—is a strong component of the SOU brand and strategic plan. We are a member of Oregon's Campus Compact. CBL has helped increase student satisfaction in recent years.

We are serving 700 more students this year than in fall 2006—with the same size faculty and fewer staff. We strive to maintain a constant student to full-time faculty ratio that is reasonable for a liberal arts university with a strong commitment to connections between student and faculty and to undergraduate research. In addition to swelling enrollment, a portion of the increase in the student to full-time faculty ratio is due to addressing the delay in recording non-admitted students into the term when course material was covered. This administrative change increases student headcount in fall which was historically counted in winter term.

Campus Initiatives and Significant Accomplishments

Each year we update our strategic plan with goals and benchmarks. The first two major goals of our strategic plan focus on academic distinctiveness and quality as well as a commitment to the arts and our region. Our students are out in the community—assessing water quality, studying economic changes, conducting environmental impact studies, and participating in the visual and performing arts activities. While cutting or phasing out small programs, we have developed or enhanced programs that meet regional needs and attract new students.

Our third strategic goal focuses on partnership. We continue to expand partnerships and use them strategically. Our faculty create curriculum that provides opportunities in the community for capstone projects, practica, and other experiential learning options. Nearly 9,000 SOU students have participated in community-based activities over the past several years.

Compared to academic year 2007-08, institution data shows our on-line and distance education delivery in 2009-10 increased 144% in fully online course offerings and 147.3% in student credit hours.

Southern Oregon University

Educated Citizenry and Workforce Development

Total Degrees Awarded

Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Actual	1,030	985	1,073	1,005	1,036	986	923	896	1,000		
Targets			923	1,000	1,020	1,020	1,020	1,020	1,000	1,010	1,030
			891	980	990	990	990	990			

Total number of bachelor's and master's degrees awarded annually

Degrees in Designated Shortage Areas

Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Actual	56	33	39	29	24	19	21	23	23		
Targets			57	40	40	40	50	60	35	40	45
			49	35	35	30	35	40			

Total number of degrees awarded in computer science

Explanation of Performance Trend

We have had relatively flat numbers in degrees awarded resulting from smaller incoming classes over the past few years. Since 2008, as enrollments have increased steadily, especially this past year, we will begin to see larger graduating classes.

Degrees awarded in Computer Science have been relatively stable in recent years; however, new programming in Computer Science as well as Emerging Media and Digital Arts will increase enrollment and degree completion.

The targeted measure “Degrees Awarded in Computer Science” is not an appropriate benchmark for SOU. A more appropriate benchmark for future years would be selected from the areas of emerging media, environmental studies, or the Bachelor of Applied Science in Management degree programs, areas that are critical to the workforce of our region.

Campus Initiatives and Significant Accomplishments

SOU experienced record growth in fall 2010 in every category we measure, including new freshmen, new transfers and new graduate students. A wide variety of campus initiatives promote increased numbers of students—and ultimately of graduates. Some examples are:

- Implementation of the Bachelor of Applied Science in Management degree program in Oregon in fall 2010,
- Implementation of the MA/MS in Interdisciplinary Studies, and a Masters in Applied Computer Science, a professional science masters (PSM) in fall 2010,
- Implementation of an undergraduate major in Outdoor Adventure Leadership in fall 2010,
- Establishment of a Center for Emerging Media and Digital Arts creating interdisciplinary curricula in the visual arts, combined with technology and communication, which responds directly to student marketplace demand, and
- Establishment of a Center for the Environment, an interdisciplinary effort, building on marketplace demands for employees with “green” expertise.

Three initiatives will increase enrollment and degree completion in Computer Science:

- A Masters in Applied Computer Science, which began in fall 2010,
- Significant and targeted recruiting in international markets in China and India in 2009 and 2010, and
- Establishment of a Center for Emerging Media and Digital Arts, which combines Computer Science, Communication, and Art into interdisciplinary curricula (minors and certificates).

Southern Oregon University

Knowledge Creation and Resources

Sponsored Research Expenditures

Targeted Measure

	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011
Actual	\$3.3	\$3.0	\$3.4	\$3.2	\$3.0	\$3.7	\$3.6	\$3.0	\$2.6	
Targets										

Expenditures for sponsored research and other activities (\$ in millions) using grant funds from external sources (e.g., federal and private). Includes teaching/training grants, student services grants, and similar support. The Sponsored Research expenditures have been revised in the 2011 performance report to more accurately represent actual campus expenditures. Targets created under the previous calculation are no longer applicable.

Explanation of Performance Trend

The declining trend in sponsored research over the past three years is associated with SOU's retrenchment during those years. Positions were eliminated, departments were consolidated, and faculty were focused on revising curricula, expanding distance delivery, and increasing student retention. Currently increased numbers of faculty members are becoming engaged and the university is investing in additional support for grant writing to increase submissions in future years.

Campus Initiatives and Significant Accomplishments

The Departments of Biology and Chemistry have established an undergraduate research facility dedicated to study in the interdisciplinary field of biotechnology. Part of SOU's commitment to undergraduate science education, the Biotechnology Research Center received a National Science Foundation Major Research Instrumentation grant of \$218,786 to modernize the lab space in the Biotechnology Research Center where undergraduate students learn how to use molecular methods in research projects. Another grant of \$180,364 is being used to enhance instrumentation in the Center. Overall, SOU has received one-time and multi-year funding of \$1,035,000 from the National Science Foundation in the current fiscal year.

Other efforts provide further undergraduate research and service to the region through grants:

- Two research centers, Southern Oregon University Lab for Anthropology (SOULA) and the Southern Oregon University Research Center (SOURC) are producing increased grant funding for local projects that meet regional needs.
- The SOU SBDC is among the Small Business Development Centers awarded federal grant funding to assist microenterprise businesses and deliver assistance to communities suffering economic hardship "attributable to corporate or government downsizing."

Philanthropy

Non-Targeted Measure

	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010
Actual	\$13.6	\$14.4	\$17.0	\$16.8	\$18.7	\$23.1	\$18.3	\$14.8	\$15.9

Net assets of campus affiliated foundation as reported in the OUS audited financial statement (\$ in millions)

Faculty Compensation

Non-Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Actual	90.6%	91.9%	94.0%	92.0%	94.4%	94.1%	94.9%	97.0%	94.9%

The average faculty compensation (salary plus benefits) as a percentage of the average compensation among peer institutions

Explanation of Performance Trend

The philanthropic trend for SOU shows a turnaround in 2009-10, with an increase to \$15.9 million or 7.4% over last year. This trend is continuing in the fiscal year 2010-11: net assets (unaudited) through January 2011 have increased to \$19.9 million, or another 25%.

This turnaround has been the result of improved market conditions and a more intensive and organized approach to fundraising. The 2008-09 decrease was due to the recent recession as well as assets expended to complete the Medford Higher Education Center. Important to note, yet not shown here, is a substantial increase in new planned and deferred gifts of \$3 million during the past 24 months. These types of gifts are increasingly important for the long-term financial stability of the university, particularly for student scholarships, and will continue to represent at least 25% of any fundraising and campaign efforts.

Regarding faculty compensation, salary decreases were negotiated in the faculty contract for 2009-10, mirroring campus staff and administration salary decreases for 2009-10. SOU continues to furlough administrators and faculty in 2010-11.

Campus Initiatives and Significant Accomplishments

Major changes in the Office of Development and SOU Foundation have resulted in more sophisticated operations and stronger relationships with donors. Donor numbers increased by 25% in 2009-11 as the result of increased donor visits by the President, Development staff, Board members, and others. Changes have been made in the areas of major gifts, planned and deferred giving, and the annual fund.

We have just started faculty/staff and student giving campaigns, and we have greatly improved alumni outreach, database management, and financial reporting. With new Foundation Board

leadership, the Board has a plan to eliminate debt on the Medford Higher Education Center within 2-3 years. For the first time in the history of the Foundation and the University, we can begin planning the early feasibility stages for a comprehensive campaign.

Our budget plan restores faculty and administrator salaries to pre-furlough levels in the 2011-12 fiscal years.

Southern Oregon University Mission-Specific Indicators

Transfer Student Graduation Rate

Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Actual					53.3%	54.4%	54.1%	54.5%	47.0%		
Targets									56.0%	56.5%	57.0%

Percentage of full and part-time transfer students who enroll at the start of an academic year and receive a degree within six years
Note: Change in data definition in 2006 rendered earlier targets obsolete

Philanthropic Support

Targeted Measure

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Actual	\$13.6	\$14.4	\$17.0	\$16.8	\$18.7	\$23.1	\$18.3	\$14.8	\$15.9		
Targets			\$18.4	\$14.5	\$17.0	\$18.0	\$19.0	\$20.0	\$24.0	\$26.0	\$29.0
			\$16.0	\$13.6	\$15.0	\$16.0	\$17.0	\$18.0			

Net assets of the SOU foundation (\$ in millions)

Explanation of Performance Trend

The variation in the mix of transfer types (those entering with very few hours vs. those entering with many) over the years will directly impact the rate of completions. Earlier cohorts of transfer students were likely more heavily weighted toward students with many hours thus reflecting a higher rate than the cohort entering in 2004-05. The rising cost of tuition and a poor economy in the state of Oregon also account for students taking longer to graduate, especially given the socio-economic status of many SOU transfer students.

The philanthropic trend began an upward cycle in 2009-10, with a 7.4% increase in total assets. With our strong focus on planned and deferred gifts, we have received gifts and bequests totaling \$3 million in the past 24 months (not shown in actuals). This demonstrates a substantial effort toward reaching the targets. The growth trend is also visible in the 2010-11 (unaudited) fiscal year: increased assets through January 2011 of \$19.9 million (another 25%). The trend is expected to continue with an improving economy and focused, organized fundraising efforts.

Campus Initiatives and Significant Accomplishments

Fall 2010 represents SOU's largest new undergraduate transfer class ever—674 students—an increase of 36% over fall 2009. With our increased attention on student access and satisfaction, as well as more sophisticated transfer student recruiting, steady increases are expected.

Research shows that students that enter through an articulation agreement persist and graduate at a greater rate than those who do not. SOU signed thirteen articulation agreements with six community college campuses in 2010. In spring 2010 we successfully piloted a traveling team model (including articulation specialist, faculty, president and provost) to accelerate the articulation agreement process.

The RCC-SOU Higher Education Center provides increased access and services to encourage RCC students to pursue a 4-year degree at SOU. We introduced the Bachelor of Applied Science in Management to appeal to those students who received an associate's degree in a technical area from a community college and wish to pursue a bachelor's degree. It is the only program of this type offered in Oregon.

Our significant increase in distance learning courses (increase of 144% over 2008 offerings) provides greater access to transfer students. Our Accounting Degree and other School of Business degree completion as well as Criminal Justice and Early Childhood Education programs continue to be offered online.

Major changes in the Office of Development and SOU Foundation have resulted in more sophisticated operations and stronger relationships with donors. Donor numbers increased by 25% in 2009-11 as the result of increased donor visits by the President, Development staff, Board members, and others. Changes have been made in the areas of major gifts, planned and deferred giving, and the annual fund.

We have just started faculty/staff and student giving campaigns, and we have greatly improved alumni outreach, database management, and financial reporting. With new Foundation Board leadership, the Board has a plan to eliminate debt on the Medford Higher Education Center within 2-3 years. For the first time in the history of the Foundation and the University, we can begin planning the early feasibility stages for a comprehensive campaign.