



# FORWARD

SOUTHERN OREGON UNIVERSITY

## **Securing SOU's Future by Embracing a New Fiscal Paradigm**

**2023-24**



# TABLE OF CONTENTS

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- Introduction .....3
- Background .....4
- SOU FORWARD Strategy .....6
- Cost Management Guiding Principles .....8
- Assumptions and Approach.....9
- Recommendations .....11
  - Academic Affairs .....12
  - Finance and Administration .....28
  - Enrollment Management & Student Affairs .....31
  - University Advancement.....39
  - Intercollegiate Athletics .....41
- Conclusion .....43

**FORWARD**

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SOUTHERN OREGON UNIVERSITY



# INTRODUCTION

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Southern Oregon University’s leaders and campus community are addressing an undeniable truth: the current fiscal path is unsustainable. As stewards of the university and with a directive from the SOU Board of Trustees to address the issues that have caused an ongoing structural deficit, university academic and administrative leaders developed **SOU FORWARD**, a four-plank realignment strategy to stabilize campus-wide operations by focusing on financial viability and strategic growth to meet the academic needs of future students, the region and state.

The focus of *Securing SOU’s Future by Embracing a New Fiscal Paradigm* is cost management, the first plank of **SOU FORWARD**. In this document, we provide a framework and a working plan for SOU’s path toward fiscal health and stability. By realigning institutional revenues and costs and diversifying its sources of revenue, the university can thrive.

This document is the product of many. Authorship, consultation, feedback, and a variety of other inputs were provided by Academic Division Directors, faculty members, classified and unclassified employees, and the executive leadership team. This document also benefits from the significant input of SOU’s shared governance partners, our two union partners, and the broader campus community—all of whom have engaged with open hearts and open minds in this work.



# BACKGROUND

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SOU must change the way it does business because the status quo is structurally flawed. Like each of Oregon’s seven public universities, we have historically relied on a combination of state appropriations and tuition revenue to pay for most operations. But the proportion of those two funding sources has flipped in recent decades—what used to be about a two-thirds share from the state and one-third from tuition is now the exact opposite. Students and their families have become overburdened, and we must not allow skyrocketing tuition to be the answer to current and future fiscal challenges.

We have completed several millions of dollars in budget reductions during the past several fiscal years—many of which resulted in one-time savings. However, the structural changes necessary to improve the university’s long-term financial condition were not made. Without these changes, we will operate at a significant financial deficit in the 2026 fiscal year. **SOU FORWARD** proposes a path toward financial stability.

**SOU FORWARD** consists of four planks, the first of which is cost management. This plank requires painful decisions that affect a number of valued colleagues and will result in changes to all academic and administrative programs. We must make the difficult decisions about what we hold most dear, what is essential to our identity, and what we can live without.

The other three planks of the **SOU FORWARD** strategy will impact our fiscal structure in three very specific areas, and each is built on a foundation of creativity and optimism. Those planks call for us to

1. Reimagine support for projects funded by external granting agencies and organizations
2. Leverage an ongoing surge in philanthropic support
3. Diversify revenue sources by pursuing entrepreneurial opportunities

These last three planks—focusing on revenue diversification—are what make **SOU FORWARD** fundamentally different from the cost reduction exercises conducted during two previous retrenchments. Further, **SOU FORWARD** seeks to change our institutional culture to include the time value of decision-making and setting clear expectations with included metrics, milestones, and actions as new projects are brought forward. When fully realized, these new revenue streams and cultural changes will enable us to avoid large, year-after-year tuition increases, grow strategically, meet future needs of the region and state, and potentially serve as a national model for public higher education funding.

We acknowledge the need to address workload among all our employees. While **SOU FORWARD** is built on optimism, we understand the imperative to review what we do and how we do it. We recognize that we cannot expect our employees to do more work with fewer resources. The work before us, therefore, must include an



analysis of our internal processes and workflows, a review of the policies and procedures that guide and—at times—impede our work, and robust dialogue about what we can stop doing as an institution.

# SOU FORWARD STRATEGY

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**Cost Management** | We must adopt a mindset of long-term fiscal stability by balancing our budget year after year (ensuring that revenue is always greater than or equal to cost) and building a robust reserve fund to manage through future external uncertainties. This work requires a variety of painful decisions that impact all academic and administrative programs and all employee groups. See remaining document (sections II - V below) for additional information.



**Grants** | Numerous funding opportunities are available from state, federal, foundations and other private entities for a variety of uses. Some may directly affect SOU's current expenditures, while others may allow us to augment or add value to existing programs. University Advancement's Office of Sponsored Programs is supporting faculty and staff who are actively pursuing and managing grants and other "sponsored" funding opportunities.



**Philanthropy** | We have achieved a series of fundraising records in recent years, and we have repositioned ourselves to continue its dynamic growth. The two single largest philanthropic gifts in the university's 150-year history were made in the last 12 months, and they cap a 125% increase in giving in five years. As the campus embarks on its inaugural comprehensive campaign, the opportunity for donors to support academic programs, faculty positions, and student services has never been greater. To be successful, we will need the entire campus community moving forward together—to support our fundraising priorities and bring new donors into our Raider family.



**Revenue Diversification** | Our efforts to explore entrepreneurial projects to diversify our revenue streams has caught the attention of our legislative and political leaders throughout the state. They are commenting publicly about the bold steps we are taking to manage our current reality and plan for the future.

The projects below are just the beginning; these current revenue projects are in the discovery phase and all are moving forward at various speeds.



## Solar

- We are moving rapidly to put together a coalition of individuals and organizations to help us become the first public university in the country to produce all of its own daytime electricity on our campus. The savings we will achieve by this work will be transformative.

## Senior Living Complex

- The idea of replacing Cascade Housing Complex with a senior living community is already generating lists of individuals who want to move into the facilities. Our goal is to create a living community that creates a unique synergy between its residents, SOU students, and the university.

## University Business District

- The proposed University Business District at the corner of Walker Avenue and Ashland Street has the potential to ease the housing shortage in the city and support SOU students by bringing in businesses that cater to our students.

## Workday Training Center

- We are learning a lot from our transition to Workday. We are working with the intent of becoming experts so that we may share our learnings with other organizations migrating to the platform; it is anticipated that many of Oregon's public colleges and universities will implement a new core information system in the coming years.

## Continuous Improvement

- We will continue to rigorously improve our processes to achieve desired outcomes. For example, SOU actively supported changes to the Student Success and Completion Model (SSCM) in 2020 and is now leveraging current practices to bring in additional state funding. SOU made great strides to ensure that we are getting as much funding as possible from the SSCM working group process. And we will continue to pursue and refine revenue enhancement by: ensuring we are getting full credit for activities we are already doing; establishing new enrollment and degree practices that align well with the funding model; and working diligently to fully-capitalize on appropriate coding and data mechanisms. This work is already yielding a significant increase in funding allocation and will continue to grow moving forward.



# COST MANAGEMENT GUIDING PRINCIPLES

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As we began this challenging process, we recognized that we had no blueprints for this work and that any recommendation we made likely would be unpopular to someone. In an effort to keep us focused, we developed a set of principles based upon the university's core values as a means to guide our behavior throughout this process. We shared these principles with our campus community each time we met to review progress toward this recommendation. The guiding principles were and remain:

- Integrity
- Primacy of students and the university
- Transparency
- Compassion
- Long-term vision
- Justice/equity/diversity/inclusion
- Universality
- Humility
- Unity

Of all of the guiding principles, our campus community seemed to focus most on our effort to create transparency in our thinking and decision-making. In fall 2022, we posted qualitative and quantitative frameworks to be used by each of the university's five large areas. This was followed by extensive data collection and analysis, much of which was developed in tandem with a variety of stakeholder groups. This data was then posted for the community in December 2022 for review and comment. We also held four town hall events for employees and students between January–March 2023 where employees and students could offer their thoughts, ask questions, and seek clarity on a number of issues.

We put forward our best effort to be as transparent as possible as we were making decisions; however, we made the intentional decision to take the vast amount of data that had been collected and analyzed and translate it into a workable plan through a 'top-down' approach. We did, however—throughout the process—ask for plans, ideas, recommendations, and more, from the entire campus community. We took those inputs into consideration and used them to develop this recommendation. This overarching plan was shared with campus in February 2022. Ultimately, we recognize that the University President must make a final recommendation to the Board of Trustees, and this plan reflects our best thinking.





# ASSUMPTIONS AND APPROACH

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In any strategic endeavor, we assert that there are two indispensable questions that must be addressed:

1. What is our current environment (the strategic context within which we are operating)?
2. How do we make ourselves adaptable to uncertainty?

The environment is shaped by our fiscal challenges, to be sure, but also by the contracts with our union partners, the perspectives of shared governance leaders, the myriad of opinions from community partners, the expectations of state and local governments, and more. The uncertainty is rooted in our inability to determine (with precision) future trends in state funding, enrollment, retention, and so forth. Thus, the plan needed to minimize the impact to the student experience, explore strategic savings versus strategic costs, respect the contracts that we have with our APSOU and SEIU partners, and ultimately avoid a ‘cut-now then cut-more-later’ approach.

We are committed to taking great care in making the necessary and difficult proposed reductions in a manner that does not undermine our work in support of Strategic Direction IV—to create a diverse, equitable, inclusive community where all learners flourish. Our increased enrollment of historically underrepresented students, our increased hire of historically underrepresented faculty and staff, and our development of current and future EDI-supporting philanthropic gifts have bolstered our efforts toward growing greater diversity, equity, and inclusion. Further sharpening our focus on JEDI efforts, we’ve appointed a Vice President for EDI and staffed the Office; conducted an institution-wide survey that sheds light on lived experiences of the university community; and developed responsive initiatives that address key findings, all of which represent significant momentum in advancing SD-IV.

The **SOU FORWARD** Plan strategically considers programmatic needs of the students it serves from all academic and administrative areas in the context of this momentum, and seeks to maintain and increase it for optimal impact on what is a transforming community. Moreover, and just as critical, **SOU FORWARD** takes care to apply its JEDI lens to this plan, in its solicitation of feedback, communication of the proposed reductions, and finally in how it will implement final decisions.

In our communication to individuals holding positions affected under **SOU FORWARD**, we took great care to provide clear, timely, and comprehensive information to allow individuals to make critical, life decisions. We also committed to mitigating the impact of reduction decisions in all ways reasonably possible.

Rather than a single-faceted approach to reductions (e.g., 15% institution wide cuts; last-in/first-out), proposed reductions under **SOU FORWARD** are mindful of the programmatic needs of our students and those who teach, administer, and support them. In this way, we position ourselves to maintain continuity of the program service



levels we provide and to develop a plan that does not inequitably burden those who remain in university employment. To that end, the three governing and two union associations, in partnership with university faculty and staff, are charged with considering how roles and functions can be reimagined, and how workloads can be reduced; how we can reasonably adjust expectations and create different ones; and find ways to invest in the person as well as the function toward a thriving, transforming community in which everyone can flourish.

In addition, the fiscal approach utilizes realistic assumptions for the future (for example, we assume that a budget will be based on enrollment figures that follow recent trends). But that does not mean that we will not be aspirational and intentional about our future and strive for increased enrollment and retention. In the past three years, we have made significant improvements to our enrollment infrastructure placing SOU in a position to implement strategies that have grown and will continue to grow enrollment. Our recent data-sharing partnership agreements with ten school districts throughout the region, progress with transfer articulation with community college partners, funding formula success in the Student Success and Completion Model, and initial results from Demand Builder (expanding our pool of prospective students) are four examples that likely will help our enrollment picture moving forward. Initial Fall 2023 enrollment data suggest strong new freshmen enrollment growth, slight growth in new transfer students, and continuing student population stabilizing from periods of enrollment loss.

# RECOMMENDATIONS

The five major units at the university developed recommendations to reduce expenditures and minimize the impact on students and academic and administrative program delivery. The result of the recommendations includes a reduction of employees, recognizing that 85% of our costs are investments in our people.

## A Comparison: Doing Nothing vs. Cost Management

	REVENUE	COST	DOING NOTHING	IMPLEMENT COST MANAGEMENT PLAN
FY 2023-24	\$ 64.4 M	\$ 63.3 M	\$ -4.9 M	\$ 1.3 M
FY 2024-25	\$ 67.1 M	\$ 64.7 M	\$ -8.1 M	\$ 2.4 M
FY 2025-26	\$ 67.8 M	\$ 67.5 M	\$ -13.3 M	\$ .3 M
FY 2026-27	\$ 70.1 M	\$ 68.7 M	\$ -14.6 M	\$ 1.4 M

Through reorganization, process improvement, and program adjustments across the university, our cost management plan recommends a reduction of 81.83 FTE, or 13% of our workforce.

## Cost Management Recommendation: Workforce Reductions

	FACULTY	UNCLASSIFIED	CLASSIFIED	TOTALS
Vacancies	6.24	12.55	17.35	44%
Volunteer Reductions	.71	1.00		2%
Retirements	14.40	2.00	1.00	22%
Impacted Employees	5.68*	9.20	11.70	32%
<b>TOTAL</b>	<b>27.03</b>	<b>24.75</b>	<b>30.05</b>	<b>81.83</b>
<b>% of FTE Reductions</b>	<b>33%</b>	<b>30%</b>	<b>37%</b>	<b>100%</b>

\*includes non-renewable positions



# ACADEMIC AFFAIRS

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For Academic Affairs, realignment planning centered on restructuring our current academic model from 7 Divisions to 4 Schools, strategically reducing program costs and identifying ways to generate additional revenue. Through a combination of retirements, resignations, voluntary FTE reductions, and “noticed” employees, the proposed plan results in savings—from 27.03 FTE in faculty and 5.7 FTE in classified and unclassified employees.

After developing a list of qualitative and quantitative criteria to help guide our decision-making, we gathered extensive data about each program. These data include academic program reviews, metric cards for each academic program, responses to cost management questions from the academic support programs, and written responses from each program addressing how they contribute to the “Three Points of the Triangle”: SOU’s commitment to liberal arts and sciences education, regional responsiveness, and creativity and innovation (copies of these documents are available upon request). Using these data and the established criteria, we developed a plan that includes, but is not limited to, moving from seven academic Divisions to four and making reductions in many academic programs.

As a regionally-responsive campus with a strong commitment to liberal arts and sciences education, and in order to continue to best meet the needs of our students, our cost-reduction measures have focused almost exclusively on making reductions within programs rather than eliminating programs. Strategies for continuing to meet student needs despite program reductions include revising our curricula and offering fewer sections of courses for which there is less student demand. Additionally, we understand that these reductions will pose challenges related to workload. Therefore, it is important to note that the Provost's Office is committed to addressing any and all workload issues that will help to facilitate implementation of proposed changes to programs in each academic unit that follows.

## **Division: Business, Communication and the Environment (BCE)**

The Division of Business, Communication, and the Environment continues to focus on innovative curriculum development, programmatic marketing, online delivery, and off-campus revenue generation. The three programs within the Division are among the most profitable departments on campus. However, the continued decline in enrollment demands that we act to reduce costs while simultaneously continuing our efforts to innovate.

Current initiatives led by BCE faculty, staff, and administration include efforts to institutionalize departmental-level marketing and recruitment, increase resources for external grants and contracts, continue to explore the potential for incorporating alternative methods of course delivery into the curriculum, and respond to regional needs through job market analysis. In addition, the reductions in BCE are a way to provide financial stability

while simultaneously investing in new programs and concepts in areas such as social media innovation, sustainable agriculture, wildlife ecology, corporate sustainability, and e-sports.

Resource-sharing and collaborations will be created through a new School of Science and Business. Some benefits will be realized immediately through shared faculty resources across biology and environmental science. Additional benefits will be realized as the new school forms in Fall 2023. Ongoing efforts include improvements in academic advising, curriculum development, community-based learning, contracted services, grant-funded scholarship, and philanthropic development.

ACTION	RATIONALE
Eliminate Division Director position	Through the use of support staff and streamlined processes, the division of BCE is being eliminated. The departments of Business and ESPS will move to a new School of Science and Business. The CMC department will join colleagues in the arts.
Reduce the total number of faculty in Business	Business has experienced a steady decline in enrollment over the past 5 years. However, it has been difficult to reduce the total number of sections offered because the program is offered both online and in-person. This requires teaching sections of courses in both formats. Through the use of innovative teaching modalities, we will reduce the number of sections by offering courses as in-person, online synchronous, online asynchronous, and self-paced in one unified course. Business is additionally revisiting its curriculum as it strives to offer courses that appeal to, or provide resources for, a broader range of students. The School of Business will leave an open faculty line in marketing unfilled, will reduce one faculty line in management through retirement, and will eliminate positions in accounting and internship delivery through early retirements.
Reduce the total number of faculty in Environmental Science, Policy, and Sustainability (ESPS)	The total number of majors, certificates, and micro-credentials in this department continues to grow. Multiple new programs are currently under review that will expand offerings at both the undergraduate and graduate level. However, as a result of changes to our general education curriculum, we anticipate as much as a 75% reduction in lower-division offerings to non-majors.

Reduce faculty FTE in Communication, Media & Cinema (CMC)	Through a voluntary reduction in FTE, CMC will slightly reduce faculty FTE. This reduction is in an area of the department that has seen some moderate decline in enrollment over the past five years.
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### Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Professor/ Business	1.00	Faculty
Senior Instructor 1/ Business	0.67	Faculty
Senior Instructor 1/ Business	1.00	Faculty
Instructor/ Business	1.00	Faculty
Assistant Professor/ Communication	0.33	Faculty
Instructor/ Environ Sci & Pol	1.00	Faculty
<b>TOTAL</b>	<b>5.00</b>	

### Revenue Considerations


Modify internship requirements and hire internship coordinator: other institutions have leveraged their students as essential human resources for community organizations and businesses. In this model, the institution develops relationships with businesses or organizations that lead to internships or externships. By further expanding on this possibility at SOU, we would continue to collect tuition dollars for opportunities and for providing the framework.

Strengthen grant productivity: Several of our BCE faculty are bringing in more to the institution in indirect cost recovery through grants than they bring in through tuition revenue. We are proposing ways to release these faculty from some teaching responsibilities to expand grant writing and research development.

e-Sports Major: Annual revenue is estimated for the growth of our existing e-Sports Program into a major within business.

Institute for Applied Sustainability, LAD (Lithia Motors, Inc.) Credential Development: Using gift funds, we are building a credential for corporate executives in corporate sustainability. This credential will provide training to executives across the globe.

Expanded Master's Programs in Environmental Science: Highly successful grant and contract work in environmental science, policy, and sustainability has created the opportunity to create a graduate program in



which all students are provided graduate assistantships. This allows us to capture some state funding while additionally adding to our growing research funds.

## **Division: Education, Leadership, Health, and Humanities (ELHH)**

The ELHH Division has had a significant number of resignations, tenure relinquishments, and retirements. Within the next three years, potentially 11 faculty members will be leaving the Division and two year-long adjuncts have each been reduced by 0.25 FTE, while other faculty are requesting reduced FTE loads. Outdoor Adventure Leadership (OAL) was impacted most severely by COVID due to the nature of the program. All other programs were also greatly impacted, but were able to adapt more easily.

Prior to our current realignment work, World Languages & Cultures (WLC) had been most impacted by changes in the University Studies requirements for BA (versus BS) degrees. They most recently eliminated the French and Japanese programs. Spanish has been proactive in exploring new ways to make their program accessible by developing a Spanish for Medical Workers certificate, developing general education courses that are not taught in Spanish, and exploring other certificate ideas specific to other degree areas that would fit into students' programs due to the new general education requirements. Philosophy continues to coordinate the Campus Theme each year and is also developing attractive general education courses. English has been highlighting the diversity of opportunities available with an English degree, which supports the Oregon Writing Project, Advanced Southern Credit, and the Teach from Your Best Self project with support from Southern Oregon Education Service District (SOESD).

Education has seen the most significant reduction in personnel in the Division. By eliminating the one-year Master of Arts in Teaching (MAT) program, faculty will be available to teach the essential teacher preparation courses in the two-year MAT program. To better address the region's needs, an online option will be added to the two-year MAT program allowing local and remote students to meet as a cohort to support one another. The synchronous online format will make the program accessible to teachers and teacher candidates in the region's more rural areas. Additionally, the current Special Education (SPED) endorsement for teachers will be offered with an online option, similar to the MAT. The undergraduate teacher preparation program is also pursuing an online option and hopes to begin making it available by Fall 2024.

The teacher preparation programs require approval from the Teacher Standards and Practices Commission (TSPC), which constrains our ability to modify the curriculum. To increase the presence of developing adult learning professionals, the Education program is pursuing an undergraduate degree in Training & Development. There are few such programs in the country, so its reach could go beyond the region.

ACTION	RATIONALE
Eliminate the one-year MAT program	Offer a two-year Master of Arts in Teaching (MAT) program, which would be accessible to teachers currently on a restricted license and future teachers in rural areas.
Merge three small programs	The current English, Philosophy, and World Languages & Cultures (WLC) programs will be combined into one department, to be named later, and will still maintain their individual majors and minors.
Decrease faculty FTE	Enrollment has decreased, so there is less need for full-time faculty. However, adjuncts will be needed to teach Education courses required for licensure. The need is especially important for Special Education (SPED) and Literacy.

### Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Education/600-Hour Appt	0.44	Faculty
Professor/ Education	1.00	Faculty
Associate Professor/ Education	0.53	Faculty
Professor/ English	0.39	Faculty
Associate Professor/Language	1.00	Faculty
Senior Instructor 1/ Language	1.00	Faculty
Senior Instructor 1/ Language	0.51	Faculty
Adjunct Instructor/Health & Exercise Science	0.25	Faculty
Adjunct Instructor / Outdoor Adv Leadership	0.25	Faculty
Associate Professor/ Philosophy	1.00	Faculty
<b>TOTAL</b>	<b>6.37</b>	





## Revenue Considerations

A decrease in student enrollment allows us to accommodate a reduction in faculty. However, our efforts to attract and retain students continue. Education is planning to offer additional contract courses as professional development opportunities for area educators. We have scholarship funding for educators interested in pursuing the Foundations of School Mental and Behavioral Health micro-credential. We have made the MAT program and SPED endorsement available online so that they are accessible to teachers on restricted licenses and those in rural areas.

English has been offering events for regional teachers and students through the Oregon Writing Project, Academic Southern Credit, and Teach from Your Best Self initiatives.

Health & Exercise Science (HEX) has been working with other programs across campus and is exploring making lab resources available to community organizations/schools.

OAL has been conducting recruiting meetings and is active in industry-related organizations.

Philosophy is developing general education courses that will attract students, continuing to develop campus themes that will interest students, and re-starting their community Friends of Philosophy group.

WLC is continuing their popular and successful Summer Language Institute in Spanish. Faculty are developing general education courses that will offer students the opportunity to learn about different Spanish cultures to develop an interest in the language. Faculty are also exploring specialty micro-credentials and certificates that would be of specific interest to a degree program or programs.

## Division: Oregon Center for the Arts (OCA)

The Oregon Center for the Arts at Southern Oregon University has demonstrated positive enrollment numbers this year over last year, but over the last five years its enrollments have declined. To reflect student reductions, the OCA has realigned several of its programs.

Music will voluntarily eliminate graduate and undergraduate programs in music performance as well as its music education concentration. These programs require substantial resources and with fewer students the programs are unable to generate enough support to maintain themselves. Although it should be noted that Music has had the greatest growth this year than it has had over the last five years, its numbers are far below what it was ten years ago. Music is shifting its instructional focus by retaining the BA/BS in Music and providing training in commercial music which will allow more students to participate with greater access to promising careers in the music industry.

For several years, the Theatre faculty have been planning realignment of their program to better prepare students for careers in the entertainment industry, but little progress was made in implementation. The university plan aligns well with Theatre's plan as it moves forward with necessary restructuring. With the loss of



Faculty FTE and prospective retirements, Theatre will adjust its program by reconfiguring some positions. There will also be additional support provided for the very successful Master of Theatre Studies position by providing the coordinator additional time for more effective planning and recruitment. Future retirements will create opportunities for strategic hiring over the next several years.

Creative Arts is eliminating an open position 1.0 faculty FTE in ceramics but that has secured the positions of the newly hired art faculty who have created excitement and enthusiasm for components of the program. Strategic plans are in place to fill the need for ceramics instruction which is very popular on campus involving guest visiting artists and artists-in-residence. Future retirements may provide opportunities to review the ceramics position as a viable option for a faculty addition.

ACTION	RATIONALE
Refocus Music Faculty FTE	Music is moving from a conservatory model of academy to a comprehensive music school model with new Certificates in Performance, Conducting, Popular Music, Music History and Theory, in addition to our pre-existing Certificate in Music Industry and Production. This will provide students with the preparation necessary to enter the music industry in all its forms, as well as to practice their art in music ensemble settings. The Master of Music in Performance and the Bachelor of Music with concentrations in Performance and Music Education will be discontinued; students currently in those programs will have a path to graduation. Three out of the seven full-time faculty have agreements for tenure relinquishment and retirement dates on or before December 31, 2025. The program will need to replace at least one of the retiring faculty, and we anticipate adding another specialist in the music industry and popular music history. These changes will streamline the program’s offering, resulting in a highly focused and more competitive program that will attract more students.
Decrease Music Faculty FTE	By offering fewer applied music lessons and eliminating the Bachelor of Music with concentrations in Performance and Music Education, fewer courses are needed. This will NOT eliminate the Music major, but rather reposition the program for future growth and opportunity.
Decrease Art Faculty FTE	Creative Arts has an open position in Ceramics that is being filled this year by a year-long ceramics artist-in-residence. This year-long position will not be renewed and Ceramics will continue to be taught in part by our Sculpture/3D



	<p>professor and in part by Visiting Artist Scholar Teachers (VAST). Ceramics is a popular course of study, and its continuation is important.</p>
<p>Refocus Theatre</p>	<p>Theatre Faculty have been strategizing ways to better train students not only for work in Theatre but for the creative entertainment industries. Theatre graduates have opportunities in film, video, gaming, concerts, special events, and more. In the university's proposed realignment plan, Theatre will revise positions to meet the needs of students and prepare them for future employment opportunities. The program will better align its offerings with student demand, and will remain a program of distinction in our region. Students will continue to have real-time experience in the development of and participation in a robust Theatre season.</p>
<p>Decrease Theatre Faculty and Staff FTE</p>	<p>With the refocus of the Theatre Program, the Technical Director, Lighting Design, and Costume Design and Construction positions will be reconfigured, aligning Theatre faculty positions with enrollment and structures at similar sized programs across the western United States. Retirements will provide opportunities for strategic hires within the next several years. A task force within the program is already engaged in laying out an exciting vision for its future. A currently vacant part-time staff position will be eliminated with the removal of one of the auxiliary Theatre Programs, the Visiting High Schools Shakespeare Program. The university will continue to engage with the Oregon Shakespeare Festival, as it is currently undergoing its own fiscal challenges, and explore possibilities for reconstituting the Visiting High Schools Shakespeare Program in coordination with OSF.</p>

### Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Professor/ Art	1.00	Faculty
Professor/ Music	1.00	Faculty
Adjunct Instructor/ Music	0.60	Faculty
Professor/ Theatre Arts	1.00 (pending)	Faculty
Instructor/ Theatre Arts	1.00	Faculty
Professor/ Theatre Arts	0.25	Faculty
Associate Professor/ Theatre Arts	1.00	Faculty

Office Specialist 2	0.40	Classified
<b>TOTAL</b>	<b>6.25</b>	

### Revenue Considerations

The OCA is housed in six university buildings across campus, containing desirable facilities and specialized equipment that could be made more available for use by the community, when not used by the university.

The OCA Box Office is desired to be used by outside performance groups and this could be made available through ticket fees to cover the expense of staff.

### Division: Social Sciences (SS)

The Division of Social Sciences is composed of thirteen distinct academic programs and two research centers, which take a variety of forms. Under the proposed realignment plan, faculty reductions are scheduled to occur in Criminology & Criminal Justice, Economics, Political Science, Psychology, and Sociology & Anthropology. Additionally, upon the resignation of the Division’s Student Success Coordinator, other Student Success Coordinators were reassigned to fill the need in Social Sciences.

Curricular reforms are necessary in several areas. The Division of Social Sciences will meet student needs through a combination of revised curriculum and, because there are fewer students, offering fewer course sections. A variety of strategies are being implemented. For example, some required criminal law courses in Criminology & Criminal Justice are being modified so that they may be taught by multiple educators within the program. Social Science chairs are discussing the potential for shared methods and career development courses. They are also discussing optimizing course modalities. The Political Science Program has voluntarily ended its major, replacing it with a new interdisciplinary major in Power & Politics.

Though quite lean, the Division of Social Sciences will continue to offer its full complement of majors, select minors, and an expanding array of certificate programs. Though some classes will necessarily be reduced, current and future students will continue to enjoy the opportunity to pursue a diverse array of academic programs. The Division is also poised to capitalize on SOU’s renewed focus on grants and sponsored programs.

ACTION	RATIONALE
Eliminate the Political Science major, replacing it with a Power & Politics major; reduce the Political Science faculty FTE	Political Science’s major headcount has fluctuated between approximately the low-40s and high-60s over the past several years. With the onset of the pandemic, those numbers remained on the lower end of that range. Additionally, a first-year Assistant Professor resigned last academic year to take a position elsewhere, in part because courses continued to under-



	<p>enroll, and another dual-appointment faculty member moved into the Division Director role. Recognizing the interdisciplinary diversity of expertise in political topics among the current SOU faculty, the existing major will be taught out with no new permanent faculty hires, and develop an interdisciplinary major focused on the study of politics titled Power &amp; Politics.</p>
<p>Reduce the Economics faculty FTE</p>	<p>Student demand in Economics has not been sufficient to support the current level of faculty FTE. A reduction in FTE should meet student needs, and those of interdisciplinary partners, at current enrollment levels.</p>
<p>Reduce the Criminology &amp; Criminal Justice (CCJ) faculty FTE</p>	<p>Major headcount in CCJ has declined over the past decade – a trend that predated the onset of the pandemic. Faculty reductions are designed to meet the current level of student demand.</p>
<p>Reduce the Sociology &amp; Anthropology (SOAN) faculty FTE</p>	<p>All SOAN faculty contribute to at least one academic program outside of their home department. Faculty are able to cover curricular needs within the program by adjusting offerings.</p>
<p>Reduce the Psychology FTE</p>	<p>The Psychology major is the largest in the Division, and depends to some extent upon term-by-term faculty to meet existing student needs. The program is considering revisions to its core offerings since there is not a dedicated neuropsychologist on staff (there is a faculty member who can teach those courses, but who also has significant responsibilities elsewhere in the curriculum).</p>
<p>Curricular Revisions</p>	<p>Curricular revisions will necessarily take a variety of forms. Some Social Science chairs are exploring shared, common courses among some of their programs. Cross-listing and cross-referencing of courses has been used extensively in many Social Science programs, and is expanding, in an effort to maximize the impact and utility of individual course offerings. In other cases, courses and majors are being reformed to increase flexibility within the program.</p>

## Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Professor/ Criminology	0.13	Faculty
Professor/ Criminology	0.39	Faculty
Professor/ Economics	1.00	Faculty
Adjunct Assistant Professor/ Political Science	0.71	Faculty
Assistant Prof/ Psychology	1.00	Faculty
Professor/ Sociology-Anthropology	1.00	Faculty
Student Success Coordinator	1.00	Unclassified
<b>TOTAL</b>	<b>5.23</b>	

## Revenue Considerations

There are also revenue-enhancement opportunities in the Social Sciences. The division contributes substantially to the dual-enrollment Advanced Southern Credit (ASC) program. ASC enrollments have rebounded after declining during the pandemic and in response to the local fires.

The Southern Oregon University Lab of Anthropology (SOULA) secures hundreds of thousands of dollars in contracted research annually, serving the region and the state, offering students opportunities to practice archeology, and generating a revenue stream.

On a somewhat smaller scale, the Southern Oregon University Research Center (SOURCE) also provides research support for clients in the region, pursues grant opportunities, and secures SOU revenue. Social Science programs are in the process of developing a series of new certificate programs that will appeal to student needs.

## Division: Science, Technology, Engineering and Mathematics (STEM)

The changes in general education are significantly reducing demand in STEM courses. The recent changes to our General Education model will significantly reduce demand for STEM courses in some strands by 33% and in others 50%. Biology and Mathematics have seen the greatest declines due to their heavy general education service contribution over many decades. However, all STEM programs are reducing the number of sections offered as well as discontinuing some courses altogether. In anticipation of these reductions, several vacancies over the last 3 years in both Biology and Mathematics have already not been replaced as part of the normal planning process.

Furthermore, enrollment trends in STEM programs had been declining and were further impacted by COVID. All programs saw declines in class sizes, resulting in multiple low-enrolled courses, decreased need for adjunct



instructors, and even challenges keeping faculty in some programs fully loaded. Due to national projections, a more rapid enrollment rebound in STEM fields was originally projected; however, this has been slower than anticipated. Faculty are actively involved in recruitment and student research, partnering with admissions, grants, SOU foundation, and community partners as they look to the future.

All STEM programs have routinely updated their curriculum, but substantial revisions to majors are in progress. Biology, Chemistry, and Mathematics are redesigning their curricula to deliver effective majors with reduced faculty. Each is looking at current trends and student career goals, in addition to regional needs in the redesign. Computer Science redesigned their program a few years ago due to retirements and hiring challenges at that time and is still refining that implementation.

ACTION	RATIONALE
Eliminate STEM Director	Division administration is being reduced to 4 Directors. This retirement is one of three and will not be replaced in reorganizing divisions from the original 7 to 4.
Discontinue Adjunct Instructor/Biology and not replace retiring Senior Instructor 2/Mathematics	Due to declining general education demand.
Discontinue current EE (Environmental Education) Master's Program but explore reimagined environmentally-oriented master's program	The EE program will serve current students until graduation in the excellent, but small, Environmental Education Master's program. Enrollments over the last 10 years ranged from 5-16 with high fluctuations in cohort size from year to year and recent decline (10-year average cohort size of 10.7, 5-year average of 9.6, and 3-year average of 7.3). A reimagined environmentally-oriented master's program could draw stronger enrollments and allow students to pursue a wider variety of career options, including environmental education, sustainability, ecology, and other environmental-oriented areas. The shared line in Biology and Environmental Education will be discontinued (incumbent resigned). We are heartened by the conversations that are already taking place between academic leaders in both the Environmental Science Program and the Education Program about offering some of the curriculum previously offered in the MSEE program as well as exploring the possibility of a reimagined stand-alone program in the future.



<p>Do not replace vacant line for Professor/Biology</p>	<p>Although one vacancy will not be replaced, two other vacancies are planned to be replaced in order to provide sufficient staffing in Biology:</p> <ul style="list-style-type: none"> <li>• Human Anatomy &amp; Physiology vacancy (professorial resignation) to be replaced by an instructor, and</li> <li>• Biology professorial position to fill gaps in revised biology curriculum, as dictated by enrollment.</li> </ul>
<p>Discontinue part-time Adjunct Instructor/Computer Science (CS) pending successful faculty search</p>	<p>This position has been used in various years to enable the program to continue to offer a robust curriculum even though the program experienced failed faculty searches. With a successful search this year (Fall 2023 start date), the additional staffing needs beyond ongoing faculty in CS should drop back to what has been normally covered with adjunct term-by-term instructors.</p>
<p>Discontinue Assistant Professor/Chemistry</p>	<p>Chemistry enrollment has declined since 2017-18, and the program has had ongoing challenges with low-enrolled upper-division courses for many years. Two faculty have similar specialties that should allow the remaining faculty member to cover that area of expertise in a revised program. Challenges will be honing curriculum and implementing some alternate year offerings to accommodate reduction in staff and to remedy low enrolled courses. We will continue to monitor longitudinal trends and be open to reconsidering staffing levels when enrollment improves.</p>

### Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Adjunct Instructor/ Biology	1.00	Faculty
Professor/ Biology	1.00	Faculty
Assistant Professor/ Chemistry	1.00	Faculty
Adjunct Instructor/Computer Science	0.58	Faculty
Senior Instructor 2/ Mathematics	1.00	Faculty
Division Director position for STEM	1.00	Unclassified
<b>TOTAL</b>	<b>5.58</b>	



## New Name: University Library and Undergraduate Studies

Departments: Undergraduate Studies (University Seminar, Bridge, Degree in Three, General Education);  
Hannon Library

Both Undergraduate Studies and Hannon Library offer valuable academic support services for students. The synergies between the two service areas, Library and Seminar, are significant. UGS faculty prepare learners with the essential skills needed for a complex, diverse, and rapidly-changing world through programs and courses supporting general education foundations, including first-year seminars and a specialized curriculum for Oregon Bridge students, who are often first-generation students. Library faculty teach academic support courses that scaffold the additional skills for students needing extra support in a seminar. Library faculty and staff also support student learning and success by providing information resources and teaching students how to use them in courses that span the entire curriculum, meeting with students for in-depth research consultations, and continually seeking out the best resources and formats to support our curriculum.

With the reduction of 1.0 Library faculty FTE and an increase in the University Librarian's administrative duties, decisions about work reassignments will be made in consultation with the Library chair, and remaining faculty and staff. As the realignment process moves forward and workload issues are addressed, attention will be directed toward options included but not limited to the elimination of services, redistribution of duties, and/or other ways of allocating Library resources.

ACTION	RATIONALE
Combine Undergraduate Studies (UGS) with the Hannon Library	A structured integration of these two units/divisions will result in a more holistic academic support structure on campus, allowing for fuller integration of information literacy outcomes into the curriculum. This will create a place where students feel more welcomed and have their educational needs met efficiently, contributing to an engaged and student-centered college experience. Seminar and library faculty already work together. During the three parts of Seminar, students work in the library with a librarian and their instructor, becoming acquainted with the methods of researching, from exploring databases to utilizing library stacks. The units also collaborate to provide student engagement and outreach events, such as the Long Night Against Procrastination, in which librarians and UGS faculty advise, mentor, and tutor students as they work on final projects each term. Uniting the two units allows for deeper organization and structure, strengthening the student experience.



Decrease Faculty/Staff	<p>The Director position will be eliminated as part of the consolidation, and the majority of duties will be assumed by the University Librarian. UGS faculty and staff will report to the University Librarian.</p> <p>To reduce workload, the library is changing its service offerings, such as moving to mostly digital documents for Government Publications. These workload modifications will allow us to reconfigure staff positions to maintain core library services with fewer staff.</p>
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### Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Eliminate Director for Division of UG Studies	1.00	Unclassified
<b>UGS TOTAL</b>	<b>1.00</b>	
Professor/Library	1.00	Faculty
Library staff member	1.00	Classified
<b>LIBRARY TOTAL</b>	<b>2.00</b>	

### Division: Graduate Studies

Vacancies in a staff position and the Master in Interdisciplinary Studies (MIIS) graduate coordinator allowed us to realize a 1.3 FTE in savings. Based on an analysis, we determined we would sunset the existing MIIS graduate program, while retaining the option to implement revisions that reduce the administrative and instructional costs of the program at some future point in time. At this time, current demand for the program does not justify the administrative and instructional costs of maintaining it.

Similarly, with the departure of the Graduate Studies Program Specialist, we analyzed the position description and worked with individual graduate programs to streamline processes and to utilize faculty and/or graduate assistants to provide support previously offered by the GSPS. In addition, the elimination of two smaller graduate programs reduced the need for administrative support.



<b>ACTION</b>	<b>RATIONALE</b>
Eliminate Graduate Studies Program Specialist	Program reductions and contractions led to reduced need for administrative support.
Eliminate MIIS Graduate Coordinator position	Phase out of the current MIIS program

### **Impact on Personnel**

<b>Division / Department</b>	<b>Planned FTE Reduction</b>	<b>Classification</b>
Administrative Program Spec	1.00	Classified
MIIS Graduate Coordinator	0.30	Unclassified
<b>TOTAL</b>	<b>1.30</b>	

# FINANCE AND ADMINISTRATION

The Finance and Administration function area has a two-phased approach for implementing changes to the recurring cost base. The first phase is to remove funded, unfilled positions (that can be vacated) from the budget. This would occur after the SOU Board of Trustees approves the recommended plan (for example, starting in May of 2023). The second phase is to implement the first module of the Core Information Replacement System (CISR). CISR implements Workday, and will involve technology and process changes, enabling better efficiency and effectiveness. The Go Live date for phase one is 1/1/2024 and quarterly program reviews will enable a full reorganization of Financial Services after 12 months.

ACTION	RATIONALE
Transform Financial Services (People, Process, Tools and Technology) with the implementation of Workday	<p>The legacy Banner ecosystem and paper processes for Business Services must be upgraded to enable a transformation of Financial Services (Payroll, the Service Center, Accounting, Budget Planning and Financial Reporting). The target is 10 FTE reduction.</p> <p>In addition, University Shared Services Enterprise (USSE) will be discontinued and three core functions moved in house (saving \$400k annually)</p> <p>These adjustments will improve processes, deliver better customer service and reduce recurring labor expenses.</p>
Implement CISR, phase one, enabling HR, Payroll and Financial process improvements	<p>The legacy Banner ecosystem and paper processes for human capital management (HR), Payroll and Business Services must be improved.</p>
Improve Facility Management by leveraging funds from other organizations; and enhance Facilities' Asset Management process (FCA model)	<p>Management vacancies will be vacated (in the near-term) and planning will continue to adopt an Asset Management framework. This work will enable us to better leverage each dollar. In addition, state bond funding and auxiliary funding will be maximized to reduce transfers (reimbursable expenses) from the E&amp;G budget.</p>

Simplify IT and reduce cyber threat	A management reorganization occurred two years ago, and internal realignment allowed better focus on Information Security. Developing an Info Security Manager (ISM) is one aspect of cybersecurity risk identification and mitigation.
Maintain safety and a sense of personal security across campus; Improve Clery Program management; Leverage City of Ashland Emergency Manager in exchange for mutual use of LMP Emergency Operations Center	Reorganization (circa Fall '22) eliminated the Assistant Director position and established a full time Clery Program manager to reduce risk of non-compliance.  We have also removed the responsibility of emergency management from the Public Safety Director's position description to better focus on parking and safety.
Reorganize Housing Administration to maximize net revenues	Two recent departures created an opportunity to revise position descriptions for front-office staff, clarifying coordinator role/responsibility, and reducing costs for this key self-supporting Auxiliary program, which transfers revenue into the E&G budget.
Enable CISR phase 2, smooth transition, flow and execution	Effective CISR project management will enable the student project module to be designed, configured and tested, effectively serving our students and faculty.

### Impact on Personnel

The following listing of positions and reorganization plan for Finance and Administration detail Phase One and Phase Two:

Department	Position	FTE Reduction	Classification
Budget Office	Sr Financial Management Analyst	1.00	Unclassified
Facilities	Custodial Supervisor	1.00	Unclassified
	Asst Director of Operations	1.00	Unclassified
	Trades/Maintenance Worker 2	1.00	Classified

	Custodian (* -use aux. funding)	1.00	Classified
	Grounds Maintenance Worker 1*	1.00	Classified
	Grounds Maintenance Worker 2*	1.00	Classified
Human Resources	Class/Comp & Recruit Coord	1.00	Unclassified
Information Technology	Info Technology Consultant 3	0.50	Classified
	Computing Coordinator I	1.00	Classified
Campus Public Safety	Office Specialist 2	0.20	Classified
Housing	Custodian/Housing	1.00	Classified
	Asst Director of Conferences/ Operations	0.25	Unclassified
VP Office	Administrative Services Coordinator	0.20	Unclassified
Business Services	Business Svcs Accounting Mgr	1.00	Unclassified
	Revenue Agent 1	1.00	Classified
PHASE 2	Reorganize Financial Services using Workday	10.00	Combination of Unclassified and Classified (TBD)
<b>TOTAL</b>		<b>23.15</b>	

### Revenue Considerations

There are continued opportunities to generate revenues that support E&G, Auxiliaries and Designated Operations Funds. For example, we hope to raise conference revenue to pre-pandemic levels. This directly benefits University Housing, and indirectly benefits E&G. Another example is found in the Print and Copy center. This service center is inward facing; but could explore other revenue sources.

# ENROLLMENT MANAGEMENT & STUDENT AFFAIRS

The EMSA division applied the principles established by the university and reviewed each position for core services to students. Each area director reviewed our overarching student needs and determined how to meet those needs while also achieving cost savings. They also evaluated a series of risk factors for each of the proposed staff reductions. In some areas, work functions are being reassigned to existing staff members as described below.

## Vice President's Office

ACTION	RATIONALE
Eliminate Vice President of Enrollment Management and Student Affairs position	The institution has made significant infrastructure changes to improve enrollment strategy and operations that now puts SOU on par with competitors. Incumbent VP is accelerating career goals and the position will not be filled.

## Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Vice President for Enrollment and Student Affairs	1.00	Unclassified
<b>TOTAL</b>	<b>1.00</b>	

## Admissions

ACTION	RATIONALE
Eliminate Office Support Specialist	Position responsibilities (reception, communications, student employee supervision, document processing, etc.) will be functionally re-imagined and absorbed in combination by Admissions Counselors, existing operations staff, and student employees.
Eliminate Portland Regional Admissions Counselor	Recruitment and territory management responsibilities will be redistributed by campus-based Admissions Counselors.



Eliminate Evaluation Specialist	This was a vacant line for an Evaluation Specialist.
Transition Native Nations Liaison position (previously funded by Admissions) into a new tribal outreach and relationship position	This position, while originally and continuously funded by Admissions, has evolved into a direct report in sole support of Native American Studies Program and Youth Programs. Following an initial meeting with the current Native Nations Liaison and faculty members in the Native American Studies Program, we are crafting a new position which will be responsible for Tribal relations, student support, and mentorship of the Native American Student Union. The goal is to have that position defined, and a search underway, by summer 2023.

In order to maintain core service levels, admissions will re-envision the role of Admissions Counselors and student employees in support of our front office and operation (reception, communication, document processing, admissions evaluation) needs. This will impact the Admissions Counselor role and time spent recruiting new students. Future technology advances with Workday and a new document imaging solution will streamline processes.

### Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Administrative Program Assist	1.00	Classified
Native Nations Liaison	1.00	Unclassified
Office Specialist 2	1.00	Classified
Regional Admissions Counselor	1.00	Unclassified
<b>TOTAL</b>	<b>4.00</b>	



## Financial Aid

ACTION	RATIONALE
Eliminate IT support	Due to the realignment and with the elimination of the IT support within the Financial Aid office, support from the IR/IT offices will continue to help the Financial Aid Office provide the needed data to our campus community.
Eliminate the VA/Scholarship Coordinator	The VA duties will be assigned to the Assistant Director and Director who were already serving as back up certifiers. An additional resource may include assistance from the Equity Coordinator for Veterans and Military Family Members. We anticipate that Veteran students will continue to have the financial aid support they require, and will maintain support from the Veterans' Resource Center.

After reviewing the number of students who utilize Title IV aid at Southern Oregon University, the need for Financial Aid processors and those who directly oversee Title IV funding is where the most support is needed. With the elimination of the IT support position, all data needs from the Financial Aid Office will need to be supported by Information Technology and Institutional Research. The VA/Scholarship Coordinator position was created to focus solely on the certification of chapter benefits for Veteran students and their dependents. This position also included the SOSA application and awarding of scholarships. The SOSA process and awarding of scholarships will be managed by the Director and Assistant Director of Financial Aid.

### Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Program Representative 1 (Vacant)	1.00	Classified
Program Representative 2 (Vacant)	1.00	Classified
Information Tech Consult 2	1.00	Classified
Fin Aid & Scholarship Coord	1.00	Unclassified
<b>TOTAL</b>	<b>4.00</b>	

## Enrollment Management & Student Support

(Raider Student Services Operations, Registration & Records, Office of International Programs, Disability Resources/UCAM, TRIO SSS)

ACTION	RATIONALE
Eliminate Coordinator of Innovative Program Development	Eliminating the position will reduce available resources to support Navigate. Basic Navigate technical support will be reassigned by other team members - outreach, innovation, training, and advanced support of Navigate users will not be possible.
Eliminate one Raider Student Services (RSS) Student Services Associate	Direct student services will take longer. It is likely that RSS will need to continue to operate in a remote services fashion aside from peak start of term intervals. RSS back office staff will need to help support front office activities limiting the bandwidth for front office to assist backlog with back office. It is also possible that RSS will need to stop directly taking phone calls and instead rely almost entirely on email communication, thereby aligning service delivery with student demand.
Eliminate Academic Records Coordinator	This is the only position within Registration and Records that is truly cross-functional. As such, the duties can be reasonably spread across other positions, but as with all employee positions, workload analysis and process streamlining may be required.
Eliminate Office of International Programs Admissions Coordinator	Some duties of this position, especially international student admissions assessment, will need to be reassigned to other appropriate staff. OIP will need to sunset some current program functionality as a result.

Writ large, these impacted areas are actively seeking ways to refine processes in order to absorb this workload. For example, we will be proposing changes to how course scheduling occurs. Some services that are not mission-critical will need to be eliminated, some services will take longer to fulfill, and these offices will need to be exceptionally judicious with taking on any new projects. Focal points will have to hinge around compliance and essential services first and foremost.

## Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
IEP & USEM TESOL (Vacant)	1.00	Unclassified
Office Specialist 1	0.45	Classified
Administrative Program Assist	1.00	Classified
Coord Innovative Pgm Develop	1.00	Unclassified
Administrative Program Assist	1.00	Classified
Administrative Program Assist	1.00	Classified
Program Representative 2	1.00	Classified
<b>TOTAL</b>	<b>6.45</b>	

## Campus Recreation

ACTION	RATIONALE
Eliminate the Membership & Programs Coordinator position	The Membership & Programs Coordinator position became vacant in December 2022. The membership duties will be spread across the Assistant Director position (Operations & Marketing) and the Director position. Some programs will be more heavily led by instructors and student-leads.

With the elimination of the Membership & Programs Coordinator position, the membership and student-employee supervision duties are shifting to a redesigned Assistant Director position and some operations/equipment management duties are shifting to the Director position. Some programming duties will be shuffled to instructors and student-leads. This suppression will be reflected in the reduction of the RECPRG index, part of the Incidental Fee allocated by the Student Fee Allocation Committee (SFAC) within ASSOU.

## Impact on Personnel

Division / Department	Planned FTE Reduction	Classification
Membership & Programs Coordinator	1.00	Unclassified
<b>TOTAL</b>	<b>1.00</b>	

## Dean of Students Office/Student Life

ACTION	RATIONALE
Eliminate shared health promotion specialist position	Other positions (Care Coordinators, Conduct Coordinator, Associate Dean of Students, and Dean of Students) will attempt to provide the services. It could be possible if/when all of the other vacancies are filled. Vacant since December 2021.
Eliminate Asst. Dir. of Student Life for Equity and Access	This position was created and implemented in August 2020 during the reorganization of Student Life. We are currently exploring optimal solutions for the reorganization of the portfolio that came under the Vice President for Enrollment Management and Student Affairs. We anticipate that reorganization to take place before the start of the Fall 2023 term and no later than January 2024. Conversations are already underway between the President, VP- EMSA, VP-EDI, and Dean of Students. We will strive to prevent any negative impact on direct service to students during and after this transition.
Eliminate Office Specialist 2	This position has been vacant since September 2021 and was slated for elimination in Phase 2 of the reorganization proposed by the former Dean of Students in 2020. It is a student-focused position but the current duties will continue to be filled by the Coord. of Student Orgs and Events with support from the New Student Programs Coordinator and the Director of Student Activities. Vacant since June 30, 2022.
Explore changes to SJEC Coordinator infrastructure	The initial draft of the plan included reducing SJEC Coordinator contracts from 12 months to 10 months, with summer identity-based activity coverage for registration events, resource referral, food pantry, and the veterans' lounge being covered by the Dean of Students Office. However, because the SJEC is funded through resources determined by the Student Fee Budget Committee and distributed through the Student Fee Allocation Committee, we will support the decisions of those groups. We are currently in discussions about reorganization, with a goal of fall term 2023. Again, we will strive for no negative impact to direct student support and explore strong guiding discussions between the SJEC and the university's EDI leadership team.



Reduce student employee wages and S&S	To recoup reduction in student employee wages any students employed by SULIFE must be eligible for Federal Work Study. Effective June 30, 2022.
Relocate 100% Dir. of Student Activities/Stevenson Union salaries to STUAFD	This position is essential to operations and must be covered by the general fund. Effective June 30, 2022.

The Student incidental fee process is happening now for AY 2023-2024 and estimated reductions to the incidental fee will be between \$500,000-\$800,000. In the area of Student Life, we have been holding positions vacant (N=4). This includes two of four positions in the Social Justice and Equity Center (Gender and Sexuality Justice Coordinator (vacant since September 2022) and Sustainability and Basic Needs Coordinator (vacant beginning March 20, 2023), one position in Student Activities (Coordinator for New Student Programs, vacant since October 2022), and one position within the Dean of Students/Director of Student Life Office (Coordinator for Student Life, Marketing, Engagement and Events, vacant since February 2023).

Once we know the incidental fee allocation (expected by end of April 2023) we will determine what reductions will need to be made. As with the 2021-2022 reductions we will try to minimize the impact to the student experience and ensure that any reductions or eliminations will not detract from SOU's Strategic Direction IV (SOU will create a diverse, equitable, inclusive community where learners flourish). Our programs and activities help students have a sense of belonging, develop new friendships, and create a better community and world. They exist to better serve our students and always put students at the core of everything they do.

On the General Fund side, we have held the Coordinator of Career Connections position vacant and are using those salary savings to pay for a consultant to review and recommend a pathway forward for this department. The Health Promotions Specialist position has been vacant since December 2021.

A concern associated with the proposed reductions for this upcoming year and the reductions that have occurred in previous years is that the area of the Dean of Students/Student Life will be unable to provide the same quality of service. We are reviewing which services will need to be eliminated and determining how to adjust campus expectations related to timely response. A proposal is being developed based on the Career Connections consultants reports that will advocate for the reallocation of existing funds within Career Connections to expand career-related services for SOU students, alumni, and employers.



## Impact on Personnel

Division / department	Planned FTE Reduction	Classification
Health Promotions Specialist	0.50	Unclassified
Office Specialist 2	0.50	Classified
Asst Dir SL 4 Equity & Access	1.00	Unclassified
Equity Coord. Vet Resources	0.20 (pending)	Unclassified
Equity Coord. Sustain/Resource	0.20 (pending)	Unclassified
Equity Coord. Racial/Justice	0.20 (pending)	Unclassified
Equity Coord. G&S Justice	0.20 (pending)	Unclassified
<b>TOTAL</b>	<b>2.80</b>	



# UNIVERSITY ADVANCEMENT

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University Advancement approached the realignment process by focusing on the programs funded by the state budget. With a comprehensive campaign underway, our goal was to maintain core strength in areas critical to ensuring the campaign’s success. We also looked carefully at those offices staffed with a single professional and were cognizant of the impact these offices would have on the broader university if eliminated.

ACTION	RATIONALE
Discontinue Corporate Relations Program	The program develops relationships between the university and regional employers. It is being discontinued in an effort to maximize university resources and focus on those items that are core to the SOU mission.
Eliminate accounting manager position	This position was created in 2022 and is currently vacant.

The Corporate Relations Program was dropped about 2008 due to personnel cuts; regrowth began in 2016. Although there is revenue earned with this program, it is not self-supporting. The challenge will be the potential lack of connection with employers in the region who want to provide professional development opportunities for their employees using their local university. If there are business partners who are also philanthropic supporters, the fundraising team will become the lead connection point for the university.

By eliminating the accounting manager position, we will be slower in processing payments as it relates to sending foundation funds to the university, processing reimbursements, etc. Additionally, with just one remaining employee in the finance and administration area we are reverting to an organizational structure that demands constant monitoring related to internal controls. This position will likely need to be reinstated in the coming years as foundation assets grow and management of its portfolio becomes more complex; it would be funded entirely by the foundation.



## Impact on Personnel

Position	FTE Reduction	Classification
Assistant Director for Corporate Relations	1.00	Unclassified
Associate Vice President for Government and Corporate Relations	.20	Unclassified
Accounting Manager	1.00	Unclassified
<b>TOTAL</b>	<b>2.20</b>	



# INTERCOLLEGIATE ATHLETICS

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Our goal was to identify cost savings that did not significantly reduce current numbers of student-athletes, thus minimizing the impact to SOU's enrollment. Athletic programs have provided a steady increase in enrollment for campus going from 353 to 432 student-athletes in five years. Since 2017, SCH for student-athletes has marked a 44.2% increase. Two of our newer programs—Cheer/Dance and Cycling—however, were in their first year as varsity sports and had not yet pulled in large rosters. Returning them to club status should still allow them potential for growth while saving the cost of fully funding the programs at the intercollegiate level.

Other savings were identified in a vacant position, shifting salary from the General Fund to private gift revenue, a classified adjustment, and numerous reductions to S&S and travel that will necessitate additional fundraising.

ACTION	RATIONALE
Cheer, Dance and Cycling will move from fully funded varsity programs to Club status.	Savings will predominantly be in salaries for full-time coaches. (A small stipend for .23 FTE will be budgeted for each program to maintain a coaching presence).
Move .25 FTE for Wrestling from state funding to private funding.	This move is the result of a private gift to endow the head coach's position. This is a cost savings on the E&G side of the equation.
Eliminate Strength and Conditioning Coach position.	Position is currently vacant.
Move Athletic Grounds position to FMP Grounds crew.	Scope of athletic field work can be absorbed into the Grounds crew.

Along with providing a solid structure for the growth of Cheer, Dance and Cycling (and other club sports), Athletics will maintain its focus on the outstanding academic and competitive performance of all our intercollegiate student-athletes. In this crucial time for SOU, we will continue to be a source for dependable, diverse enrollment and retention at a financially viable level...and we will win championships doing it.



## Impact on Personnel

Position	FTE Reduction	Classification
Competitive Cheer/Dance Head Coach	1.00	Unclassified
Wrestling Coach to gift funds	.25	Unclassified
Cycling Head Coach	.75	Unclassified
Head Coach, Strength and Conditioning	1.00	Unclassified
Grounds Maintenance Worker 2	1.00	Classified
<b>TOTAL</b>	<b>4.00</b>	



# CONCLUSION

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We approached this work with an appreciation for the complexity of the challenges, and humility in the understanding that there were no perfect or ‘right’ answers. The urgency with which we crafted this plan was driven by the diverging curves between revenues and costs and a desire to take the time needed to act with compassion for those whose positions are impacted by the recommendation.

The cost management piece of **SOU FORWARD** is just one piece of a broader strategy to repair the structural flaws in the university’s financial model that have resulted in recurring budget crises over the past 25 years, and to ensure continued access and academic success for our students. We have confidence that this strategic approach will help to secure the university’s future for generations.

To minimize the possibility of future fiscal crises, like the one we now face, we need to create a culture that incorporates stronger accountability measures. The Board of Trustees will play a crucial role in those processes. Put simply, as new proposals are introduced for Board consideration, and as new proposals are introduced to the President, five questions must be answered before any approval is given:

1. What resources will this new proposal require?
2. What are the anticipated fiscal or performance benefits from this initiative?
3. What is the time horizon for these expected benefits?
4. What metrics and measurements will be used to monitor progress?
5. What actions will be taken if the expected milestones are not achieved?

By embracing this cultural shift, we can help mitigate the likelihood of uncontrolled programmatic cost increases. All of us must acknowledge our responsibility to keep the institution on sound fiscal footing.

We also understand, and accept, that there will be many critiques of this recommendation, but at the same time we are united in our desire to move the institution forward in a fiscally sustainable way—maintaining our affordability and accessibility—so that we can continue our excellent service to the students for whom we were built to serve.