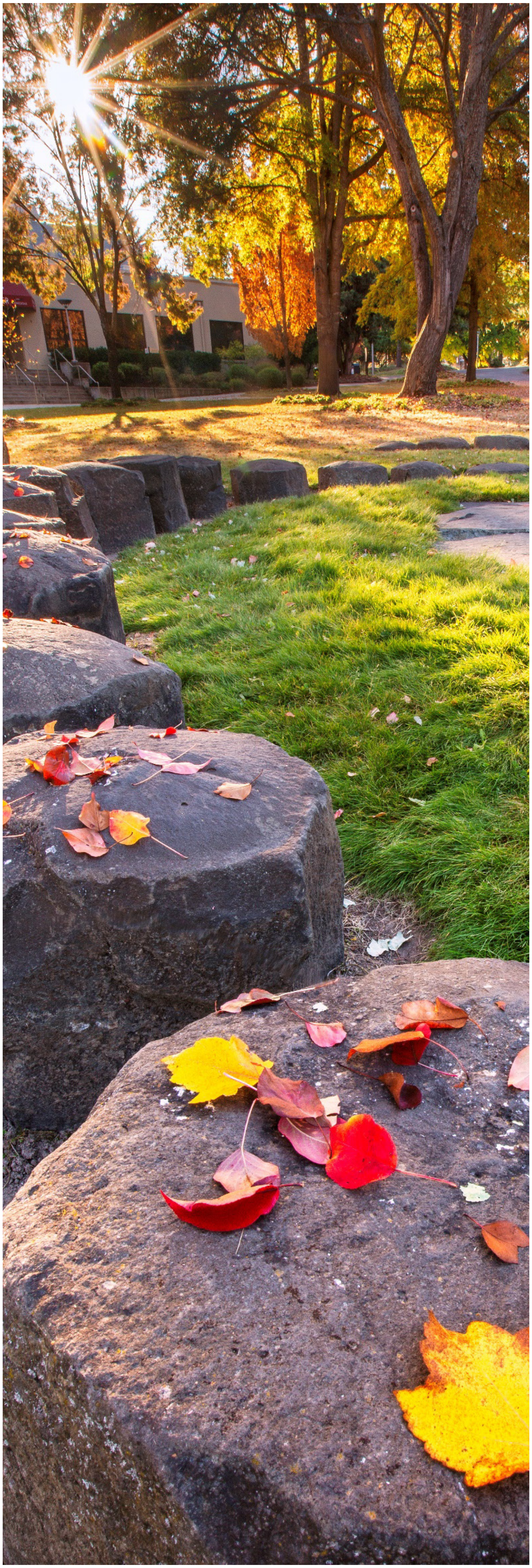
Southern OREGON UNIVERSITY

PATH TO FISCAL SUSTAINABILITY

The Vitality Plan

FINAL | July 21, 2026



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Introduction

Southern Oregon University sits at a crossroads. Our students, faculty, staff, and community are committed to the long-term health and viability of the university we all value. This moment calls for a bold transformation, one that honors our legacy but is willing to forge ahead in fundamentally different ways. The Vitality Plan provides a roadmap for a financially stable SOU and an innovative vision that will allow the university to thrive.

The landscape in higher education is shifting in a seismic way. Institutions, particularly public regional universities, are contending with a myriad of challenges, such as demographic shifts, changes in student behavior, market forces, and availability of alternative options.

Southern Oregon University is embarking on a bold transformation to become the nation's defining model of a resilient, place-based regional public university that is small by choice and distinctive by design. Our new proposed mission centers on educating students for resilient, meaningful lives by making the Rogue Valley our classroom, mentorship our method, and practical, experiential work our curriculum. Moving away from the outdated model of a generic regional institution, the Vitality Plan adopts a "Living Laboratory" operating system that unifies the university's academic offerings and prioritizes the cultivation of essential human capacities that no machine can replicate.

This strategic direction, organized around interdisciplinary Academic Cornerstones and a streamlined, single-dean administrative structure, represents a fundamental shift toward a de-siloed, financially sustainable future that ensures SOU's long-term survival and distinction in a rapidly changing higher education landscape. Rather than simply eliminate a long list of majors and associated student opportunity, this dramatic redesign of how we will deliver curricula allows us to preserve nearly every major currently offered at SOU—creatively leveraging faculty expertise to provide students with the broadest possible set of options within a much more fiscally efficient structure.

Background And Context

Today's financial crisis at Southern Oregon University (SOU) is not a sudden product of current economic shifts, but rather the impact of an outdated fiscal model. Historically, public higher education institutions across the State of Oregon relied upon a stable, predictable funding matrix composed of a major share of state legislative appropriations complemented by student tuition revenues.

In the latter decades of the twentieth century, this funding paradigm maintained a stable structural equilibrium, wherein state allocations accounted for approximately two-thirds of the university's operational cost base, leaving student tuition to fund the remaining one-third. However, as state-level fiscal priorities shifted, this ratio underwent a dramatic and permanent inversion.

By the early decades of the twenty-first century, the funding matrix flipped entirely, shifting two-thirds of the operational burden onto students and their families through tuition and fees, while state appropriations contracted to cover just one-third of the institutional budget. This inversion placed an unsustainable financial burden on the student consumer base and exposed SOU to intense financial vulnerability whenever student enrollment patterns deviated from optimistic projections.

A DECADE OF FISCAL STABILIZATION EFFORTS

In early 2026, SOU arrived at operational and financial crossroads due to a compounding mixture of long-term structural imbalances, shifting state funding priorities, and a steep enrollment decline that materialized over the last decade. This institutional crisis, while accelerated by current economic headwinds, reflects weaknesses that predate the establishment of the university's independent governing board following the dissolution of the Oregon University System in 2015.

In November 2013, the university administration announced a formal state of retrenchment, a contractual term within the university's collective bargaining agreement with the Associated Professors of Southern Oregon University (APSOU), which took effect during the 2014-15 academic year. The retrenchment strategy sought to rebuild an exhausted fund balance, stabilize enrollment, improve student retention rates, increase average course section sizes, and eliminate low-enrolled courses while instilling strict accountability metrics regarding faculty workloads.

Recognizing these vulnerabilities, the State Board of Higher Education and the Governor established explicit conditions in May 2014 before granting SOU an independent Board of Trustees in 2015. State policymakers observed that SOU's fiscal weakness was a persistent, structural condition rather than a transitory phase. Although a subsequent comprehensive evaluation in 2018 noted positive trend lines and short-term reserves on hand, the university has struggled to maintain fiscally healthy reserves.

Compounding this revenue inversion was a steep drop in enrollment. SOU's full-time equivalent enrollment declined from 4,108 students in 2015 to 3,209 in 2024, representing an overall 22% reduction in full-time student enrollment in a decade.

Concurrently, institutional spending grew at an average annual rate of 4.9%, driven heavily by escalating costs outside the university's direct control, such as Public Employees Retirement System (PERS) contribution rates and Public Employees' Benefit Board (PEBB) healthcare adjustments. This stood in sharp contrast to core institutional revenues, which grew at an average annual rate of less than 1%.

THE SOU FORWARD REALIGNMENT STRATEGY (2023-2024)

To resolve the expanding structural deficit, university academic and administrative leaders engineered SOU FORWARD, a comprehensive four-plank realignment strategy designed to stabilize operations by matching institutional costs with realistic revenues. The strategy combined immediate, aggressive cost management with long-term initiatives in grant generation, an expansion of philanthropic contributions, and revenue diversification through the implementation of several entrepreneurial ventures.

The primary cost management plank required sweeping, painful reductions that fundamentally altered the academic and administrative landscape of the campus. Recognizing that 85% of the university's operating costs represented direct investments in personnel, the cost management plan recommended a major downscaling of the university workforce, eliminating 81.83 FTE positions, which translated to a 13% reduction in the university's total workforce.

This major workforce downscaling was achieved through a combination of leaving open vacancies unfilled, securing voluntary reductions, processing retirements, and enacting direct layoffs. Position reductions were spread across all primary employment categories, including 27.03 FTE positions from faculty lines, 24.75 from unclassified administrative staff, and 30.05 from classified personnel.

THE RESILIENCY PLAN AND THE DECLARATION OF EXIGENCY (2025)

Just two years after implementing the initial realignment strategy, SOU continued to face challenging financial headwinds. While the diversification planks in SOU FORWARD generated positive early outcomes—including $22 million in total grant support, a 125% increase in philanthropic giving, and nearly $6 million dollars in targeted solar grants—the university's core revenue streams continued to deteriorate.

During the 2025 legislative session, the Oregon Legislature approved a biennial higher education budget funded strictly at the Current Service Level. This allocation operated as a baseline-cuts budget, because it failed to keep pace with state-mandated increases in healthcare and retirement benefit expenditures. This funding gap pushed SOU's existing academic and administrative infrastructure out of balance for an institution whose functional enrollment had dropped significantly.

Faced with a projected baseline annual operating cost of $71 million and an imminent cash shortage, the SOU Governing Board of Trustees directed the administration in June 2025 to identify $5 million in immediate budget reductions. Recognizing that minor adjustments could no longer fix the structural imbalance, university leadership determined that SOU had to transform into a smaller, more resilient enterprise where recurring revenues explicitly exceeded costs.

To execute this transformation legally and structurally, the University President took the historic step of declaring a formal state of financial exigency on August 1, 2025. Financial exigency, defined as an imminent and severe fiscal crisis threatening an institution's survival, provided a cooperative mechanism within the university's collective bargaining agreement with APSOU to re-engineer academic and administrative operations.

The Resiliency Plan targeted a sustainable operating framework centered around an annual General Fund budget baseline of $60 million, selecting programmatic offerings based on regional economic demands, workforce priorities, and student graduation patterns. To hit this target, the Resiliency Plan mandated a second major workforce contraction, eliminating an additional 70 FTE positions across campus. This second reduction wave cut 28 faculty lines, 28 unclassified administrative roles, and 14 classified worker positions.

When layered on top of the initial SOU FORWARD reductions, the university cut a cumulative total of 151.83 FTE positions in under three years; these reductions were composed of 36% faculty, 34% unclassified staff, and 30% classified workers.

CUMULATIVE WORKFORCE CONTRACTIONS (SOU FORWARD + RESILIENCY PLAN)

Faculty reductions:	27.03 FTE (SOU FORWARD) + 28.00 FTE (Resiliency) = **55.03 FTE**
Unclassified staff reductions:	24.75 FTE (SOU FORWARD) + 28.00 FTE (Resiliency) = **52.75 FTE**
Classified staff reductions:	30.05 FTE (SOU FORWARD) + 14.00 FTE (Resiliency) = **44.05 FTE**
Total Position Losses:	81.83 FTE (SOU FORWARD) + 70.00 FTE (Resiliency) = **151.83 FTE**

The academic core was aggressively reconfigured under the Resiliency Plan, reducing the university's curriculum to 31 majors, 19 minors, and a streamlined selection of graduate degrees. Some programs flagged for elimination in early drafts were conditionally preserved, provided they implemented radical efficiency overhauls.

THE INFLECTION POINT: LIQUIDITY DEFICITS AND HB 5204 (2026)

Despite the aggressive personnel and program cuts mandated under SOU FORWARD and the Resiliency Plan, SOU's operational stability suffered a severe infrastructure disruption in early 2026. Complications resulted from the transition to the university's new financial resource enterprise software platform, Workday, which had been approved for implementation by the SOU Governing Board in 2022.

The lack of data visibility within Workday quickly collided with an emergency cash shortage in early 2026 when the university's updated cash flow modeling revealed that while baseline budget sheets showed a paper stabilization, the institution's actual cash receipts and expense trajectories would breach mandatory minimum cash threshold by May 2026. Further, the internal analysis revealed that SOU's underlying expense trajectory, combined with the structural timing of tuition receipts, projected that the university would be unable to meet its financial obligations prior to the end of the fiscal year.

In direct response to this threat, university leaders, Board of Trustees members, and the Higher Education Coordinating Commission (HECC) collaborated to approach the Oregon Legislature in obtaining bridge funding during its 2026 regular session. House Bill 5204 established a $15 million General Fund Special Purpose Appropriation allocated to the Emergency Board, designed to function as emergency short-term solvency funding for SOU's fiscal year 2027 operations.

To verify SOU's emergency funding request, a comprehensive review team, which included the chief financial officers from the University of Oregon, Oregon State University, and Oregon Institute of Technology, corroborated SOU's findings that its cash survival remained dependent on the exact timing of external state subsidies rather than positive operating margins. They also noted that the one-time revenues (such as pandemic relief funds) had masked the true scale of the university's structural cash deficit.

A subsequent assessment of cash flow projections completed by CliftonLarsonAllen in April 2026 confirmed constrained liquidity for SOU. The sensitivity models proved that SOU's cash line was vulnerable to deviations in student enrollment and fee collectability.

THE DELOITTE PLAN

In May 2026, national consulting firm Deloitte, which had been hired by the HECC, proposed a path toward fiscal sustainability, even if sustainability meant merging with another institution or becoming a smaller yet independent university. Deloitte's consultants issued a stark warning: the university must radically restructure or risk winding down its operations entirely. The firm's resulting "Option Path" was built around achieving roughly $20 million in annual savings to stave off insolvency by summer 2027.

At the heart of the Deloitte proposal was a deep, painful reshaping of the university's academic identity, aiming for about $8 million in cuts within Academic Affairs alone. To stabilize the budget, the plan recommended suspending or eliminating several long-standing programs and consolidating or heavily reconfiguring others. Under this lean model, the university would enforce a target average class size of

22 students and subject enrollment numbers to strict quarterly reviews. Deloitte's Option Path shifted resources away from the traditional liberal arts, pivoting hard toward high-demand, career-focused fields like Business, Education, and Health.

Beyond the classroom, the proposal suggested outsourcing certain administrative functions and leasing out campus buildings to generate fresh revenue. To allow time to implement these sweeping changes, the plan assumed a one-time, $15 million emergency funding boost split across fiscal years 2026 and 2027, with a hard deadline for full transition by June 2027.

The publication of the report immediately sparked intense debate across the campus and the surrounding region. Faculty and staff voiced sharp opposition, questioning the validity of the data used by the consultants and arguing that the cuts penetrated too deeply into the soul of the institution. Recognizing the community's anxiety, SOU's leaders and the Board of Trustees clarified that they viewed the Deloitte report as a resource rather than a finalized blueprint. Ultimately, SOU administrative leaders were directed to use the report to craft their own sustainability strategy, attempting to balance financial survival with SOU's core educational mission.

REIMAGINING SOU FOR THE FUTURE (JUNE 2026)

After four and a half years of crisis management, highlighted by the SOU FORWARD and Resiliency plans, Board of Trustees members, administrators, and campus leaders all agreed that this new effort needed to solve the fiscal structural imbalance that had been building for decades. Campus stakeholders all agreed that the morale and future success of the institution depended upon a comprehensive, thorough, and durable solution.

On Friday, May 8, 2026, the Board of Trustees directed university leaders to use Deloitte's Option Path framework (which recommended a $20 million structural change) as a resource to construct the SOU Vitality Plan, a path toward achieving fiscal sustainability by the summer of 2027. This figure, determined by Deloitte, would solve the structural imbalance and provide a fiscal cushion to help regenerate reserves and protect the institution from unforeseen circumstances. Campus stakeholders also understood that given a national landscape where colleges and universities are now closing or merging at a rate of almost one per week, this effort would not be simply a fix. It would be necessary for the survival of the institution.

Guiding Principles

Any transformational process, particularly at an institution as complex as a public university, involves making choices that are incredibly challenging and for which there are no easy answers. Thus, a process like this, which impacts the livelihoods of students, faculty, staff, and the broader community, requires a set of guiding principles to navigate the uncertainty and gravity of the effort. In 2023, as work began on the project that ultimately became SOU FORWARD, university leaders developed a set of principles based upon the institution's core values as a means to guide our behavior throughout that process. We shared these principles with our campus community each time we met to review progress toward that recommendation. The guiding principles have led us ever since and also informed the work on the SOU Resiliency Plan and the current SOU Vitality Plan.

These principles are:

- Integrity
- Primacy of students and the university
- Transparency
- Compassion
- Long-term vision
- Belonging and inclusion
- Universality
- Humility
- Unity

After the challenges of the SOU Resiliency Plan, much of which had to be developed over the summer of 2025, transparency quickly became one of the most important focus areas. Given a very short timeline to develop the Vitality Plan (May 8 until June 15, 2026), the central challenge was in trying to ensure that all campus stakeholders had a voice in the development of the plan, and that there would be a genuine respect for all of the contributions put forward.

Strategy and Approach

In any strategic endeavor, we continue to 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?

As previous work has illustrated, 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 Service Employees International Union (SEIU) partners, and prepare for the sea change happening in higher education around the state and across the country.

Immediately after the May 8 board decision, the university President assembled the Transformation Advisory Committee. This consultative group was composed of student, faculty, and staff leaders (coincidentally also representing the leadership of all three shared governance entities and both union partners) as well as two members from the Board of Trustees. This group provided strategic guidance that helped to inform this plan.

In an attempt to organize and solicit inputs and recommendations from campus stakeholders, the President sought volunteers to populate two work groups, one focused on the university's future academic portfolio and the other focused on the administrative footprint. The institution's dean of students facilitated similar dialogues with volunteers from the student body. The outputs and recommendations from all of these groups were shared with the campus community on a public website. Additionally, community stakeholders and any other on-campus contributors were invited to submit their own proposals and recommendations through the use of an always-on feedback portal. The recommendations in the plan in the pages that follow reflect a deep review, understanding, and appreciation for all of the inputs received, and a genuine desire to give agency to all campus stakeholders. Finally, this plan incorporates feedback provided through the provisional plan timeframe as required by the APSOU contract. Refer to Appendix A for details on all feedback provided and how it has been incorporated into this plan.

The SOU Vitality Plan is distinctive from SOU FORWARD and the Resiliency Plan in one important way. Our campus understands that the Vitality Plan cannot simply be an effort to create a smaller version of our Twentieth Century selves. Instead, the environment demands that we create something truly revolutionary with a realistic awareness of the new landscape of higher education, particularly as it applies to public regional universities.

SOU remains in a financial crisis that is also an identity crisis. The two cannot be solved separately. Faculty visioning sessions, reimagining workshops, and the Resiliency plan all converged on a single conclusion: SOU cannot survive as a generic public regional university trying to be everything to everyone. It can only thrive by becoming undeniably distinctive.

Three facts shaped what comes next:

- SOU's distinctive assets are real and rare. A small-campus intimacy creates an environment where students are known by name. The Rogue Valley is the teaching environment: its bioregion, its arts ecosystem, its rural workforce needs, its Indigenous knowledge, its outdoor recreation economy. SOU faculty's deepest professional commitment is mentorship, with a 154-year history of public service in a region that still needs a university.
- The market is shifting beneath traditional regional universities, including the demographic decline, a credibility crisis in higher education, an artificial intelligence (AI) revolution that is reshaping what knowledge work is worth, and a public-sector funding model that has not kept pace. Institutions that try to compete on the old terms of broader programs, more buildings, and marginal cost advantages will lose.
- A workshop of deans, directors, and chairs went further: stop solving 21st Century challenges with 20th Century systems.

EVALUATION CRITERIA

Hundreds of ideas, recommendations, and proposals from both formal and informal groups of campus stakeholders were generated. In relatively short order, leadership needed a decision framework for both the evaluation and consideration of these inputs for inclusion in the final plan. Every proposal was assessed in three stages, in the order described below. Stages A and B establish financial viability metrics. Stage C tested fit with the university vision. A proposal that could not answer Stage A credibly did not proceed, or was placed in a parking lot for future consideration.

A. Overview of the Proposal

Before anything else, each proposal needed to state, plainly:

- Programs / activities eliminated or downsized under the proposal
- Programs / activities combined or redesigned under the proposal
- Number of personnel impacted by the proposal
- Cash savings associated with the proposal (annual, recurring)
- Timeline for realizing cost savings

Standard for advancing: a proposal needed to show real, recurring savings. Those that did not meet this standard were not rejected outright; rather, they were gathered for future consideration.

B. Potential Unintended Consequences

For each proposal, we considered the potential foreseeable second-order effects:

- Fiscal: downstream revenue loss, lost enrollment, stranded costs, or contractual obligations the headline savings may obscure
- For academic programs, cross-program academic impact: courses, prerequisites, or shared faculty other programs depend on
- Marketability of SOU: impact on how prospective students and families perceive the institution and its distinctive promise
- Regional partnerships: impact on the employers, agencies, tribes, festivals, and communities our mission depends on
- Workload: impact on the faculty and staff who remain, and whether the change is sustainable for them
- Responsibility: maintain an acceptable minimum service level for all administrative and support functions

C. Fit with Proposed Revised Vision (For Academic Proposals)

Proposals that cleared Stages A and B were tested against the four filters below. Each was a yes/no question; the pattern of answers, informed by judgment, determined a proposal's likelihood for inclusion in the plan.

1. Cornerstone Fit: Does the program clearly advance one of the academic cornerstones?
2. Living Lab Fidelity: Does the program operate through the Living Laboratory model: place as syllabus, structural mentorship, portfolio outputs, flexible calendar, interdisciplinary collaboration, and AI-resilient capacities?
3. Distinction: Would a prospective student choose SOU specifically because of how we offer this program, rather than choosing a larger, cheaper, or closer institution for the same credential?
4. Stewardship: Is the program financially sustainable at realistic enrollment levels, and does it serve the public mission of an Oregon regional university? This filter folds together mission consistency, regional responsiveness, and sufficient student demand.

The Future Southern Oregon University

MISSION

Southern Oregon University educates students for resilient, meaningful lives by making the Rogue Valley our classroom, mentorship our method, and practical and experiential work our curriculum.

This *proposed* new mission names three commitments that, when taken together, are SOU's alone:

- **The Rogue Valley as classroom:** place is not a setting; it is the pedagogy. The bioregion, the arts ecosystem, the rural economy, the Indigenous lands, and the wilderness are the texts that students study and the materials with which they work.
- **Mentorship as method:** the faculty-student relationship is not an extracurricular feature; it is the delivery model. Every student has known mentors. Workload, calendar, and program structures are grounded in this commitment, not built around it.
- **Practical and experiential work as curriculum:** students graduate with portfolios of real work for real audiences with real stakes: performances staged, research published, ventures launched, watersheds restored, communities served. Education produces evidence.

VISION

Southern Oregon University will be the country's defining model of what a regional public university can be: small by choice, distinctive by design, financially resilient, and rooted in place, where every student graduates with real work, real mentors, and human capacities that no machine can replicate.

This *proposed* new vision recognizes that in order to thrive as a public regional university in a Twenty-First century higher education landscape, SOU needs to be mindful of its unique contributions and laser focused on a value proposition for current and prospective students. The SOU Vitality Plan is a bridge to the development of that new institution.

We intend to transform into an institution that:

1. Intentionally **connects to the communities** we serve using a bioregional approach
2. Provides **streamlined pathways** to degree completion in every academic discipline
3. Offers **flexible options** for students through innovative, interdisciplinary academic design models
4. Incorporates a **human-connected approach** to education that is cognizant of the rapid pace of emerging technologies

COMMUNITY CONNECTEDNESS

Many universities claim to be connected to the communities they serve. This plan intends to imagine that connectivity on a much more holistic level. We understand that a public regional university at its best is far more than an economic prosperity engine. It is also foundational for workforce development and readiness, and intellectual and cultural exploration. Our aim is to move beyond the buzz words and platitudes to operationalize community connectivity.

The new SOU will connect all academic and student activities directly to community businesses, enterprises, agencies, and organizations. This effort will offer many benefits: for students, it will provide far more real-world, bio-regional connected pedagogies and facilitate a higher degree of experiential learning. For community partners, it means leveraging the intellectual and creative energies of students, faculty, and staff to address locally important strategic issues. For the region, more broadly, it facilitates a network of opportunities that will help our communities flourish and celebrate our vibrant cultural distinction.

STREAMLINED DEGREE PATHWAYS AND FLEXIBLE OPTIONS

Our students have taught us the importance of the value judgement they make when considering higher education opportunities. They make decisions based on cost, availability of scholarships and financial aid, and location. What is less frequently talked about, but incredibly important, is the timeline to degree completion. Institutions in this competitive higher education landscape are offering more opportunities for streamlined pathways. SOU has done an admirable job over the last several years to increase the availability and quality of our dual-credit courses (Advanced Southern Credit). As a result, many students start earning college credits at younger age.

The following initiatives will lay the groundwork for our goal of offering streamlined degree pathways in every academic discipline.

- Prioritize Degree in 3, 3+1, and 4+1 models (which offer shortened pathways to a bachelor’s degree as well as streamlined options for graduate degrees) and stackable credentials
- Streamline shared curricula: multiple majors share core courses, with both lower- and upper-division shared courses increasing interdisciplinary approaches, breaking down silos, and reducing curricular overlap that leads to low-enrolled courses
- Curricular flexibility: strategically moving some content online that is suitable for asynchronous delivery to focus limited in-person resources on high-impact applied and community-based learning
- Clear degree pathway documents for every major
- Adapting the university’s General Education model to reflect statewide patterns and ease the burden of pathway navigation

HUMAN-CONNECTED APPROACH

As controversial as the national discourse is around artificial intelligence and its effect on current and future life, we understand, particularly at the university, the value of deep interpersonal, human connection. The future landscape of higher education will increasingly involve more synthetic service delivery. As students make value judgements about investments in higher education, many will choose these technologically advanced and likely more cost-efficient options. But there will continue to be a distinct need for those students who require human connection to succeed academically, emotionally, and personally.

The university recognizes that it must expose students to the AI revolution and educate on issues of ethics and governance. Employers throughout our region have been explicit in their expectations for SOU graduates to help them adapt to current and future technological realities. We can choose to provide that exposure and not shy away from the impact that AI is having on nearly every aspect of human life, conscious of controversies surrounding environmental concerns, ethical usage, or general anxieties for its use. This demands that we be intentional about celebrating the importance of human connection in all of our academic disciplines and student activities. This specific intention, more than any other part of the Vitality Plan, is the link that ties us to our past as an institution and our legacy as a university built on love, caring, inclusion.

Vitality Plan Restructure

ACADEMIC PORTFOLIO

The following academic vision is a culmination of campus and community inputs. It is a synthesis of the extraordinary volume of shared thinking developed over the spring of 2026, including ideas submitted through the Vitality recommendations portal, the Academic Portfolio Workgroup's recommendations, the bioregional applied university white paper, and faculty and student academic visioning workshops. Together, these sources reflect remarkable consistency in their recommendations. Collectively, feedback clearly demonstrated that SOU must maintain a narrow academic portfolio, retain distinctive disciplines while eliminating departmental silos, place experiential learning at the center of the student experience, and reduce administrative overhead. The academic cornerstones and program structure presented here translate that shared conviction into a single, coherent portfolio designed to be financially disciplined, student-centered, and recognizably rooted in the Southern Oregon region.

The university will replace its multiple-dean model and transition to a single Dean of Faculty reporting to the Provost and working directly with department chairs. This is the administrative expression of the principle to eliminate structural silos that organize the academic portfolio: a leaner, flatter structure that realizes meaningful salary savings, clarifies lines of communication, and allows the institution to design, update, and pivot programs with the speed that the current moment demands. This removes layers of administrative mediation, secures immediate salary savings, and places frontline department chairs in a position to offer direct input into academic decision-making and programmatic adjustments. The result is a structure that does more than cut costs; it ensures that the resources preserved through this transformation flow toward teaching, mentorship, and the distinctive SOU academic experience.

THE ROGUE VALLEY LIVING LABORATORY

A pedagogical model, not a program.

The Living Laboratory is what unifies the set of academic cornerstones. It is not a building, a department, or a separate initiative; it is the operating system every program shares. This framework makes it concrete. The Living Laboratory rests on six principles. Every program, existing or new, should be testable against all six. A program that satisfies fewer than four is, by definition, not yet a Living Laboratory program.

1. **Place is the syllabus**
   Every program will teach with and through the Rogue Valley. The bioregion, the Indigenous histories, the arts ecosystem, the rural economy, and the wilderness are the course content, not field-trip backdrops. Students leave knowing this place deeply because the place is what they studied.

2. **Mentorship is structural**
   Every student will have at least one known mentor for every year of their program. Faculty workload reflects this commitment explicitly: mentorship is counted, supported, and protected, not added on top of teaching loads. Mentorship is the deliverable, not the bonus.

3. **Work produces work**
   Every student will graduate with a portfolio of public-facing outputs: performances staged, research published, ventures launched, communities served, watersheds restored, films completed, businesses built, classrooms taught in. The portfolio is the transcript that matters.

4. **Time follows learning**
   Academic calendars will be designed to optimize student learning. SOU will adopt a mix of formats, such as full terms for foundational coursework, intensive and immersive blocks for field- and project-based learning, or intensive terms for off-season internships, fieldwork, or online learning opportunities. This change is necessitated to strengthen the learning environment and provide teaching flexibility.

5. **Structural silos are eliminated**
   Programs will collaborate around shared curriculum. For example, film students may document a watershed restoration led by environmental science students, or business students build the project incubated by creative-industries students. General education will be reimagined as portfolio-based interdisciplinary work along broad pathways rather than rigid prefix-based requirements.

6. **Human-equipping and technology**
   Our curriculum will prioritize the cultivation of essential human capabilities: good judgement, creativity, empathy, ethical reasoning, and strong interpersonal relationships. We will equip our students to critically engage with, adapt to, and design emerging technologies. We will continue to foster academic authenticity, accuracy, and ethical leadership and prepare our graduates to lead in our community today and tomorrow.

REQUIRED KEY PRINCIPLES FOR EVERY ACADEMIC PROGRAM

- 30 -to- 36 credit lower-division General Education model to reflect statewide model
- Potentially add up to 15 upper-division credits in General Education
- 24 -to- 32 credit lower- and upper-division interdisciplinary shared coursework (6-8 shared courses within or across Academic Cornerstones) to include:
  - Introductory concepts
  - Data literacy

- Moral and ethical reasoning
- Cross-cultural collaborations
- Human and technology interactions
- Methods and inquiry
- Practicum/applied learning
- University integrative capstone

- 60 -to- 80 credits satisfying major requirements, including shared coursework listed above

- Elective credits, minors, etc. to attain 180 total credits to graduate

- General principles of class size management that include:
  - Emphasis on shared curricular efficiencies across programs
  - Generally, target minimum class sizes of 40 in lower division lecture/hybrid courses
  - Generally, target minimum class sizes of 20 in upper division courses
  - Program targets will undergo a holistic evaluation, with some class size ranges being smaller or larger sections

- Connected Learning principles at different stages throughout the curriculum that require work or service experience that is directly connected to their academic experience, such as practicum, internships, campus, or other work experience:
  - Experiential learning early in the program focused on an introductory course in the Academic Cornerstone
  - Interdisciplinary capstone at the end of the program
  - Engaging with living laboratory principles

- Clear degree pathway documents for every major, shifting from lecture to studio: face-to-face class time should focus on debate, troubleshooting, creating, or receiving coaching from faculty

- Clear transfer articulation pathways for every major

- Certificate Curriculum: Redefine the meaning of a certificate at SOU to meet industry-specific needs, focused on employer-recognized skills and what adult learners will take, in addition to streamlining those that bring a value to traditional students throughout their program of study

- Accelerated Pathways: Prioritize 3+1 and 4+1 models

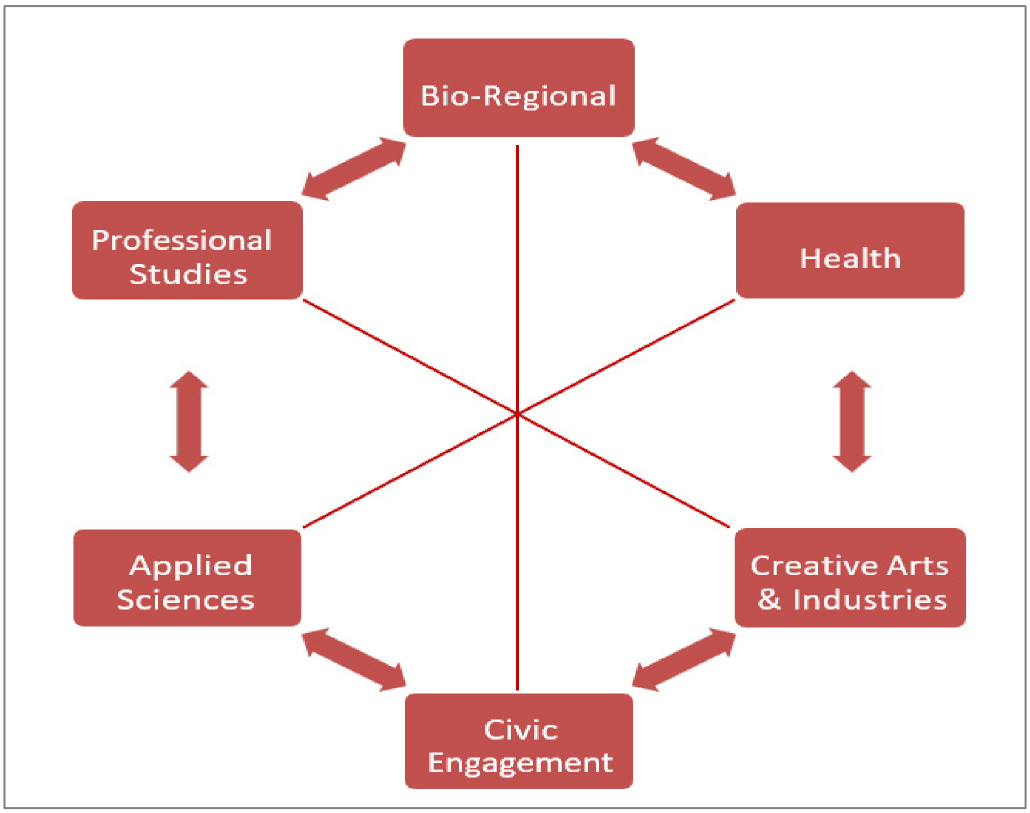
- Streamline core curricula: multiple majors share core lower-division curricula, increasing interdisciplinary approaches, breaking down silos, and reducing curricular overlap that leads to low-enrolled courses

- Curricular flexibility: Move content online that is suitable for asynchronous delivery to focus limited in-person resources on high-impact applied and community-based learning (use of the flipped classroom concept, as opposed to the fully online courses concept)

- Exceptions may be made, for example, in programs with licensure requirements

ACADEMIC CORNERSTONES

The Academic Cornerstones serve as the conceptual framework for Southern Oregon University's reimagined academic identity, functioning as cross-disciplinary anchors designed to dissolve traditional departmental silos. Composed of six thematic areas of Bio-Regional, Health, Creative Arts & Industries, Civic Engagement, Applied Sciences, and Professional Studies, these cornerstones provide a strategic lens to ensure that all programs align with the university's distinctive, place-based mission. Rather than acting as rigid administrative directives, they offer guidance for a "Connected Learning" paradigm, where diverse majors leverage interdisciplinary core efficiencies while remaining unified by the "Living Laboratory" operating philosophy. Ultimately, the cornerstones translate shared institutional principles into a coherent, student-centered portfolio that is clearly rooted in the Rogue Valley's unique ecosystem and workforce needs.



To embrace fully this new pedagogical model, we recognize the need to make difficult choices about which academic programs are best suited for the future SOU. Therefore, each program was tested against four questions; each is a yes/no answer. The pattern of yes versus no determined the program's status in the new academic portfolio. These are the same four filters applied in Stage C of the Evaluation Criteria listed previously. This was not a mechanical exercise. The filters were decision aids, not algorithms. Judgment, accreditation requirements, regional commitments, and equity considerations informed the decisions.

#	Filter	The Question
1	Cornerstone Fit	Does this program clearly advance one of the academic cornerstones?
2	Living Lab Fidelity	Could the program operate through the Living Laboratory model: place as syllabus, structural mentorship, portfolio outputs, flexible calendar, interdisciplinary collaboration, AI-resilient capacities?
3	Distinction	Would a prospective student choose SOU specifically because of how we offer this program, versus choosing a larger, cheaper, or closer institution for the same credential?
4	Stewardship	Is the program financially sustainable at realistic enrollment levels and does it serve the public mission of an Oregon regional university?

ACADEMIC AFFAIRS PROGRAMMING AND ORGANIZATIONAL STRUCTURE

New Departments & Majors/Stand-Alone Minors	Starting Faculty FTE	FTE Reduction	Classification	Remaining Faculty FTE
Arts & Communication	**15.00**			**12.00**
Art		2.00	Faculty	
Communication				
Digital Cinema				
Digital Cinema & Prod Arts BFA				
EMDA				
Media Innovation		1.00	Faculty	
Biology & Chemistry	**9.00**			**9.00**
Biology				
Biomedical Science				
Chemistry Minor				
Business & Economics	**15.00**			**14.00**
Applied Economics				
Business Administration		1.00	Faculty	
Healthcare Administration				
Innovation & Leadership				
Master in Business Admin				
Minor in Marketing				
Clinical Mental Health Counseling	**5.00**			**5.00**
Master in CHMC				
Computer Science & Math	**8.00**			**7.00**
Computer Science				
Applied Mathematics		1.00	Faculty	
Data Science				
Financial Mathematics				

Education	**12.00**			**11.00**
Associate Dean of Education				
Early Childhood Development				
Education Studies		1.00	Faculty	
Master of Art in Teaching				
Master of Science in Education				
Environmental Science, Policy & Sustainability	**5.00**			**5.00**
Ecology & Conservation				
Environmental Science & Policy				
Sustainability				
Health & Exercise Science	**8.00**			**6.00**
Health & Exercise Science		1.00	Faculty	
Outdoor Adventure Leadership		1.00	Faculty	
Humanities	**8.00**			**5.50**
English/First-year Seminar		1.50	Faculty	
Spanish Minor				
Master in Spanish Lang Teach				
Philosophy (no major or minor)		1.00	Faculty	
Library	**6.00**	1.00	Faculty	**5.00**
		1.00	Unclassified	
		4.00	Classified	
Performing Arts	**14.00**			**10.00**
Music		2.00	Faculty	
Theatre		2.00	Faculty	
		1.00	Unclassified	
		2.00	Classified	
Master of Theatre Prod & Desi				
Psychology	**9.00**			**8.00**
Psychology		1.00	Faculty	
Social Science	**15.00**			**11.33**
Criminal Justice		1.00	Faculty	
History				
Human Service		1.00	Faculty	
Sociology & Anthropology		.67	Faculty	
Minor in GSWS		1.00	Faculty	
Minor in Native American Stud				
Minor in Military Science				
Administration		2.00	Deans/Unclassified	
CATL		1.00	Unclassified	
Institutional Research		1.00	Unclassified	
Faculty Totals	**134.00**	**20.17**		

Staff Totals	**12.00**	
TOTAL SAVINGS		**$4,387,482**

Program Elimination

Music Industry and Production

While the Music Industry and Production program will be discontinued in its current form, we remain committed to our outstanding music offerings. The Music major and many of its connected ancillary programs will be retained, though the curriculum must be streamlined to ensure long-term viability. We will also maintain a significant presence in emerging media and design and in digital cinema, preserving meaningful creative pathways for our students.

As noted previously, the new academic organization will be streamlined. The faculty members who chair our programs will have an integral part of academic decision-making. When evaluating individual faculty for elimination, their ability to teach broadly both within and across disciplinary lines was a paramount driving consideration, and will continue to be essential moving forward with the new structure. The new organizational structure is outlined below.

Program Benchmarks

Several academic programs have new benchmarks that must be attained as a test to their continued viability. These include:

Human Service

- Attain 60 total majors by September 2028
- Attain 90 total majors by September 2029
- Develop an online Human Service major pathway option, available to students starting September 2027
- Collaborate with PSY-SOAN for the joint development of major/program for students to become Licensed Behavioral Health and Wellness Practitioners; program ready to accept students by September 2028 (dependent on availability of Oregon Board of Psychology licensure requirements)
- Strengthen community partnerships for student recruitment and internship placement
- Develop and promote credit for prior learning options for certifications and work experience related to social service and behavioral health; and
- Explore offering continuing education for behavioral health practitioners.

Economics

- Faculty will be responsible for core curriculum in Business Analytics, including advising the certificate in Business Analytics

Media Innovation

- Attain 30 total majors by September 2028
- Attain 40 total majors by September 2029
- Consist of courses taught by existing faculty after the currently planned 2028 retirement

STUDENT AFFAIRS AND ENROLLMENT SERVICES

Writ large, student affairs programming contributes to holistic student development and academic success by fostering a sense of belonging outside the classroom. By managing vital campus resources such as mental health counseling, residential life, career services, and diverse student organizations, the professionals who work at SOU have a direct line to student retention and graduation rates. Student affairs programming bridges the gap between academic instruction and personal growth, ensuring that students are supported during personal or financial crises and also develop leadership skills and emotional resilience for life after graduation.

We recognize the incredibly important role that Student Affairs and Enrollment Services plays in supporting student success, and we must also recognize that the university's footprint will be smaller in the years to come. The position reductions included in the Vitality Plan reflect both projected enrollment declines and reductions in available funding. Specifically, the elimination of the Care Coordinator position and three Student Success Coordinator positions are associated with reductions in general fund resources resulting from enrollment declines. In contrast, the elimination of the Media Coordinator and Belonging and Engagement Coordinator positions are driven by reductions in student fee revenue, including a 16% reduction in incidental fee funding allocated through the Associated Students of Southern Oregon University (ASSOU). Every effort has been made to identify reductions that would have the least direct impact on students while preserving the core services and supports that contribute to student retention, persistence, and graduation.

Dean of Students Office

Within the Dean of Students Office, a vacant Care Coordinator position (1.0 FTE) will be eliminated. Care coordination responsibilities will be redistributed among existing staff members, and the office will continue to provide support and connection to resources for students experiencing personal, financial, behavioral, or academic challenges. However, the elimination of this position means there will no longer be dedicated Care Coordinators within the division. As a result, response times may increase and the capacity for proactive outreach and case management will be reduced. The office will prioritize students with the most urgent and complex needs while continuing to provide care and support services within available staffing resources.

The Media Coordinator position was previously reduced from 1.0 FTE to 0.5 FTE during SOU FORWARD. Due to ongoing reductions in student fee funding, the remaining 0.5 FTE Media Coordinator position will be eliminated. While communication and marketing support remain important functions, the university will explore alternative approaches to meeting these needs with existing resources.

Office of Student Belonging and Engagement

The Office of Student Belonging and Engagement will eliminate one Belonging and Engagement Coordinator position (1.0 FTE). This reduction is necessary due to projected enrollment declines and a 16% reduction in incidental fee funding allocated through the Associated Students of Southern Oregon University (ASSOU). The Director of Student Belonging and Engagement will work with the remaining team members to evaluate current programs and services, identifying those that can be sustained and those that may be reduced or discontinued. In making these decisions, priority will be given to minimizing impacts on students and preserving programs that provide the greatest value to student engagement, belonging, and success.

Office of Advising & Orientation

With declining enrollment and an increased emphasis on interdisciplinary collaboration, the university will require a different student support model and fewer Student Success Coordinators (SSCs). As a result, the Office of Advising and Orientation will reduce SSC staffing by 3.0 FTE.

The office will transition from a specialist model, where SSCs are assigned exclusively to specific schools or colleges, to a centralized, student-centered model located on the third floor of the Stevenson Union. SSCs will be cross-trained to support students across multiple academic areas while continuing to serve as primary liaisons for designated departments and programs. This approach will provide greater flexibility, allow caseloads to be distributed more equitably, and ensure continuity of service despite declining enrollment.

The centralized location is designed to improve the student experience by placing SSCs in close proximity to many of the university's most frequently utilized student support services, including Career Connections, the Veterans Resource Center, the Food Pantry, TRIO, the Dean of Students Office, Student Belonging and Engagement, and Raider Student Services. This proximity will allow for warm handoffs and coordinated support, enabling students to access resources more efficiently. The location will also strengthen collaboration with Admissions by allowing prospective and newly admitted students to be connected directly with SSCs when questions or concerns arise.

While SSCs will continue to maintain close relationships with designated academic departments and programs, including regular presence within academic buildings, the new model creates a more integrated support network that enhances both student access to resources and collaboration between academic and student affairs professionals. Faculty partnerships will remain a critical component of identifying student needs, supporting timely interventions, and promoting student persistence and completion.

Youth Programs

SOU's Youth Programs has provided pre-collegiate educational experiences for K-12 students for more than 40 years. The program sparks early college curiosity through residential summer camps like Academy, academic competitions, and culturally specific programs including Academia Latina, and Konaway Nika Tillicum. Additionally, the program offers pathways like Advanced Southern Credit to enable high school students to earn university credits early. By combining academic enrichment with hands-on campus life, SOU has assisted thousands of regional students build confidence and prepare for future higher education success each year.

We recognize the phenomenal success and impact that SOU's Youth Programs have had on the participants, families, and communities in the region and state. Currently, the revenue generated through Advanced Southern Credit has remained in the Youth Programs budget rather than transferring into a more centralized pool of resources for the broader university. In the Vitality Plan, this revenue will shift to provide operational support for campus. By Summer 2027, Youth Programs will be required to operate within a budget that no longer includes the ASC funding.

Strategic adjustments in this area also reflect process changes introduced through the Workday transition. As we adapt, we are prioritizing programming that strengthens our recruitment pipelines while thoughtfully balancing the needs of both campus and community. We remain committed to sustaining the connections these programs foster, even as we refine how that work is delivered.

International Programs

Strategic adjustments to International Programs account for Workday-driven process changes alongside the broader challenge of declining international student enrollment. We recognize the important role these programs play in enriching our campus community, and we are working to position this area for resilience amid shifting enrollment trends.

Admissions

Strategic adjustments in Admissions are designed to maintain the momentum and effectiveness of our core recruitment initiatives. By concentrating resources where they have the greatest impact, we aim to preserve the strength of the efforts most central to enrolling and supporting future students.

Student Affairs and Enrollment Management	Impacted FTE/savings	Classification	
Student Affairs	5.00	Unclassified staff	
Student Affairs	.50	Classified staff	
Youth Programs	1.00	Unclassified staff	
Youth Programs	1.00	Classified staff	
International Programs	1.00	Unclassified staff	
Admissions	.45	Unclassified staff	
Merit Remission	$200,000		
TOTAL SAVINGS			**$967,205**

ADMINISTRATIVE FOOTPRINT

The Option Path presented by Deloitte identified three distinct options for service delivery. The first included a partnership with a large institution that theoretically could provide a fee for service. The second would incorporate a consortium of similar institutions to provide services at scale. The third option requires a partnership with a third-party provider. In preparation for the Vitality Plan, the university explored all three of these pathways and identified a fourth: the possibility of reorganizing areas independently without sacrificing a minimum service level.

The Administrative Footprint Working Group quickly assessed that the consortium model would take too long to implement, mirroring a similar analysis by Deloitte. The collection of recommendations from the working group as well as many online submittals revealed a desire to explore independent options. The following are the Vitality Plan recommendations in each functional area:

1. Business Services: Feedback from the campus has been clear about our need to improve data analysis and transparency. In direct response, we will reorganize Business Services to achieve critical cost reductions with an emphasis on data integrity, including collection, analysis, and reporting. This reorganization will allow for a concentrated effort in a Business Intelligence Office composed of financial data analysis, institutional research, and Workday management and governance. The reorganization will incorporate five staff reductions.

2. Information Technology: The IT team conducted a self-assessment in consultation with leadership assuming a smaller overall footprint for the university. They also prioritized critical items and important service deliveries, such as cyber security and client services. The Vitality Plan will reshape the department by adding a Chief Information Officer/Chief Information Security Officer to provide strategic oversight. This reorganization will also include the elimination of four staff positions.

3. Facilities Management and Planning (FMP): Reshaping this area will require a new way of thinking and contributions from the campus community. The Vitality Plan incorporates the elimination of five staff positions. The answer to this smaller footprint requires a redesign of workflows and service levels and depends upon a shared responsibility for our campus facilities.

4. Service Center: In the Vitality Plan, the Service Center will be realigned with appropriate other areas. For example, personnel responsible for contracts will shift to the General Counsel's office and driver clearance will move to FMP. The result is the elimination of two positions, and the Service Center will no longer be identified as a separate operational area.

In addition, we are exploring a recommendation from consulting firm Campus Works about the possibility of sharing some specialized services with other Oregon universities. As such, we are in discussion with Eastern Oregon University and Western Oregon University. There may be opportunities to share Human Resources functions, cybersecurity capabilities, General Counsel, Title IX/Equity Grievance, contracting, and compliance. Because these are in the discussion and consideration phase, we are not including these in projected savings at this point. We are encouraged by our colleagues' interest in the partnership and expect to have definitive answers in each no later than December 2026.

The Vitality Plan calls for the elimination of multiple software contracts, including Banner and Navigate 360, totaling $1,225,000 by the end of FY 2027. We have already implemented a number of processes to reduce costs related to credit card fees and our use of third-party vendors for transportation of resources. These two initiatives will generate an additional $384,000 in annual savings. Shared services agreements will result in $250,000 in annual savings by the end of FY2028.

Finance & Administration	Impacted FTE/savings	Classification	
Business Services	6.00	Classified staff	
Information Technology	2.48	Classified staff	
Information Technology	1.00	Unclassified staff	
FMP	6.00	Classified staff	

Software eliminations	$1,225,000		
Process improvements	$384,000		
Shared Services	$250,000		
TOTAL SAVINGS			**$3,453,334**

UNIVERSITY ADVANCEMENT

A plank in the SOU FORWARD plan identified philanthropy as an integral part of the university's financial future. Since the publication of that document, philanthropy has continued to grow—by a total of 500% during the last decade. This growth reflects a commitment from donors to the health of the institution and confidence in its durability.

With the challenges that precipitated the SOU Resiliency Plan, the SOU Foundation Board of Trustees approved a massive change in its support structure for the university's Development and Alumni Relations programs. The decision effectively moved all fundraising-related expenses (including total compensation and service and supply budgets) underneath the SOU Foundation for the duration of the university's inaugural comprehensive campaign. This cannot be overstated: the agreement made by the foundation, as generous as it is, has a shelf life. At the time of this writing, the university's ambitious inaugural $100 million comprehensive campaign has reached an impressive $67 million in just five years. Based upon the campaign's current trajectory, it is not unreasonable to imagine the completion of the campaign in the next three years.

At that point, campus leaders will have an important decision to make. The success of the campaign indicates that continued donor support exists for the university. The SOU Foundation will continue to partner with the university to provide financial support for staffing; however, the university must ultimately retain financial responsibility for the enterprise. Successful development and alumni relations programs do not stop and restart. They continue by building upon their success by bringing more and more interested philanthropic partners into the fold. It is therefore critically important that the university prepare, and plan for, reinvesting in Development and Alumni Relations at the completion of the current campaign.

Auxiliary Enterprises

The SOU Vitality Plan acknowledges that our institutional transformation must be far more comprehensive than our administrative footprint and academic portfolio. The Option Path provided by Deloitte rightly recommended an analysis of all our auxiliary functions. We used that Option Path as a resource but expanded our view to look more comprehensively institution wide. Thus, the Vitality Plan proposes new fiscal models for Housing and Dining, Athletics, SOU Farm, Jefferson Public Radio, Schneider Museum of Art, and Higher Education Center in Medford.

HOUSING AND DINING

As articulated in Deloitte's Option Path, several initiatives in SOU Housing and Dining have already been implemented, which are projected to yield more than $1.1 million in savings annually. These initiatives include discontinuing grade point average (GPA) incentive housing remissions, filling unused housing capacity, and closing the gap between dining pricing and the cost of service. Service hours, menus, and approaches will likely evolve to better match student behavior.

INTERCOLLEGIATE ATHLETICS

Our goal with the SOU Vitality Plan is to move athletics away from dependence on transfers from the university's Education and General Fund. We acknowledge that for institutions like SOU, athletics typically depends on some type of institutional support for fiscal sustainability. Yet, our current challenge demands a shift in thinking. We also acknowledge the important benefits athletics brings to SOU. In addition to being the highest performing public institution in the National Association of Intercollegiate Athletics (NAIA) for six of the last eight years, SOU student-athletes comprise 20% of the university's full-time equivalent student enrollment. They also retain, perform, and graduate at higher levels than the student body as a whole. Finally, student-athletes contribute to the university's myriad of backgrounds, origins, and perspectives.

Our challenge for athletics was to close a $1.5 million annual gap, which would greatly reduce the dependence on institutional funding. Philanthropic commitments for the next two years will total $1 million per year. The Vitality Plan will also include $454,000 in permanent cost reductions and a greater reliance on fundraising. Beginning in FY 2027, athletics will implement a new fiscal model with the requirement to be completed and fully self-sustainable by the start of FY 2029.

The chart below indicates the specific cost reductions that will complement the philanthropic support. These specific cost reductions will be implemented in FY 2027.

Athletics	Savings	Notes
Athletic instructors	$66,662	Eliminating 2 unclassified positions
Men's Wrestling	$65,000	Philanthropic salary offset for head coach
Physical Education Activity fees	$35,000	Adjunct reductions
Pre-season meals	$20,000	Cost reduction
Pre-season housing	$30,000	Cost reduction
Team assessments	$113,000	Philanthropic offset
Targeted gifts	$1,000,000	Philanthropic offset (only thru FY 2029)
Remissions	$200,000	Reductions
TOTAL SAVINGS	**$1,529,662**	

SOU FARM

In Deloitte's Option Path, it was suggested that the SOU Farm become a self-sustaining enterprise. Founded in 2013 as a student-led initiative to foster sustainable farming practices and to provide hands-on experience for SOU students, it has grown in scope and impact. Its work now goes beyond SOU through a robust partnership with Rogue Valley Farm to School, which serves as southern Oregon's Regional Hub for Education and Procurement. Through this partnership, the SOU Farm is the site for garden education programs for more than 1,000 students from more than a dozen schools in the region. It is also serves as an important demonstration site for students from pre-school through fifth grade.

In addition, produce grown at the farm is provided to the SOU campus community, Ashland School District, and local Community Supported Agriculture (CSA) members. The 5-acre farm utilizes State funds to professionally manage the farm and its student workers, support community programs, and deliver hands-on research opportunities for students. Reductions in overall funding will require The Farm at SOU to transition fully to a self-support model by December 31, 2026. Self-support for The Farm at SOU will require collaborative efforts with regional non-profits and/or for-profit farming enterprises.

Farm	Impacted FTE	Classification	
Farm manager	2.00	Classified staff	
TOTAL SAVINGS			**$180,146**

JEFFERSON PUBLIC RADIO

The relationship between SOU and JPR extends well beyond half a century. We appreciate the partnership and acknowledge JPR's importance to the media environment and the region. As with all auxiliary functions, however, we understand the importance of decreasing its dependence on institutional resources. The Option Path from Deloitte recommended that JPR identify a different fiscal sponsor; instead, we have explored a path to reduce SOU support and maintain the relationship.

SOU will maintain the Federal Communications Commission (FCC) broadcast licenses that are essential for JPR to operate. SOU and the JPR Foundation will augment the Agreement to Exchange Services and Support executed in 2017 between the parties to outline steps to shift operational responsibilities for JPR from SOU to the Foundation. This will include hiring all new JPR employees under the JPR Foundation (JPRF) and outlining transitional steps that can be taken to optimize the efficient use of resources and comply with FCC regulations. As long as SOU remains the FCC licensee of JPR stations, JPR's executive director will remain an employee of SOU, ensuring SOU can independently manage JPR's FCC licenses. This obligation cannot legally be delegated to JPRF. SOU will fund 15% of JPR executive director's compensation to support this FCC legal obligation. The terms of all other existing agreements between SOU and the JPRF will remain unchanged, specifically related to JPR's continued occupancy of its studio facility built in 2018 and fully funded by JPRF. Based on JPR's projected FY27 budget, JPR will be 99.3% self-supported in FY2027.

JPR	Savings	Type
Executive Director	$172,649	Philanthropic offset via JPR Foundation
TOTAL SAVINGS	**$172,649**	

SCHNEIDER MUSEUM OF ART

The Option Path from Deloitte recommended that all entities housed within the academic areas, such as the Schneider Museum of Art, should cover direct and indirect costs through outside revenue and not draw on Education and General funds. While we recognize the museum's importance as an academic resource, its primary purpose is outward facing. The Schneider Museum of Art continues to be a recognized venue for contemporary art and cultural engagement, serving both the university and broader community. The museum will continue to pursue philanthropic support through memberships, donor cultivation, foundation support, grants, sponsorships, and other fundraising activities to sustain its operations and programs. As adopted in the Resiliency Plan, museum staff will remain 100% self-sustaining, saving roughly $350,000 annually.

HIGHER EDUCATION CENTER, MEDFORD

SOU maintains a strong, vibrant, and collaborative partnership with community colleges across the state and around the region. Our most significant partnership is with Rogue Community College, which remains the institution's largest community college feeder. Our two institutions have shared the RCC/SOU Higher Education Center in downtown Medford since September 2008. Current trends, along with closure of the Small Business Development Center in 2025, now allows for an updated partnership for usage of the HEC. The modified contract allows for additional use by RCC students and a larger share of cost responsibilities for informational technology, maintenance, and custodial services by our community college partner.

APSOU Provisional Plan Requirements

In accordance with the university's collective bargaining agreement with APSOU, and in recognition of specifications in Article XII, the following items are included as a part of this Provisional Plan.

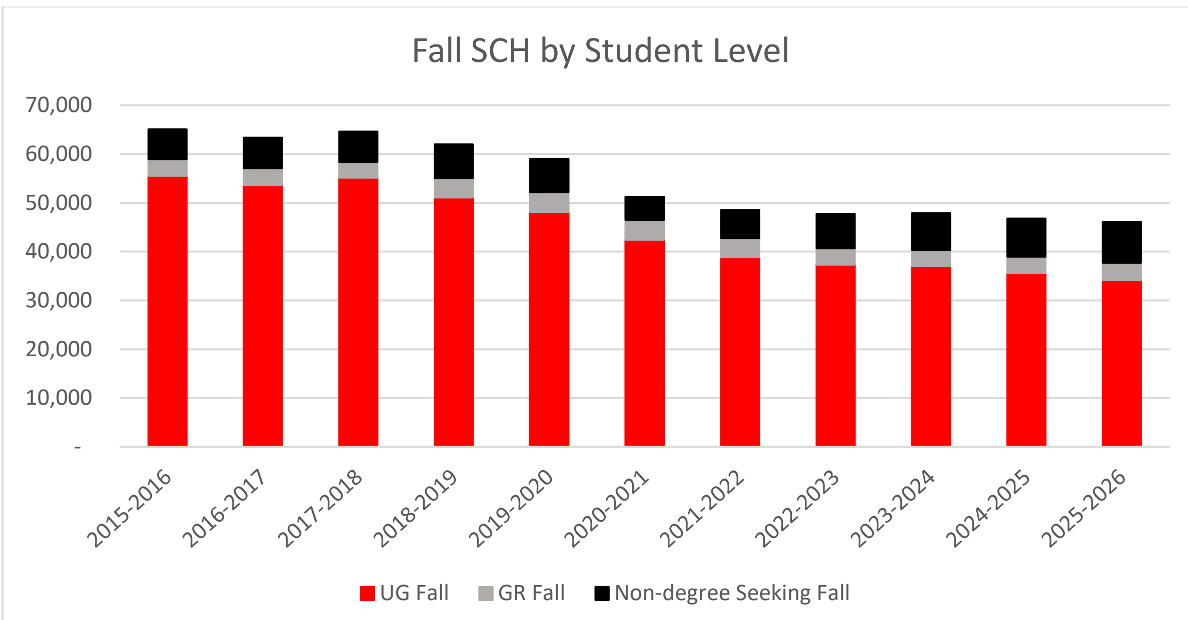
Under the Provisional Vitality Plan, the following variables have been evaluated. These assessments reveal a continued state of exigency. As decisions for academic program changes were reviewed, each potential choice was evaluated using these factors:

a. ***Institutional guidelines and mission***: All decisions were made in alignment with a revised Southern Oregon University mission. When continued fiscal challenges persisted after the Resiliency Plan, the mission was revised to be more focused on place-based and experiential learning, and is based on the academic visioning workshops for faculty and students held in the 2025-2026 academic year.

b. ***University admission patterns, historical, current and projected***: All decisions were made in conjunction with the admissions patterns over the past 10 years, focusing specifically on variables from the past 3 years of program-specific data. Additionally, the projected impact of program changes on future enrollment was considered and included in the final assumptions for enrollment projections. For example, the goal of maintaining as many majors as possible through shared curriculum was deemed to be a better direction than simply eliminating the 10 lowest-enrolled programs of study.

c.

Academic Year	Undergraduate Degree-seeking Students	Graduate Degree-seeking Students	Non-degree seeking students (i.e. ASC)
2015-2016	55,530	3,451	6,101
2016-2017	53,650	3,490	6,192
2017-2018	55,177	3,185	6,227
2018-2019	51,081	3,992	6,885
2019-2020	48,148	4,092	6,821
2020-2021	42,458	4,072	4,681
2021-2022	38,821	3,947	5,757
2022-2023	37,348	3,365	7,022
2023-2024	36,988	3,379	7,495
2024-2025	35,610	3,389	7,804
2025-2026	34,205	3,525	8,413
Total % Change	**38% Decline**	**2% Increase**	**37% Increase**



d. ***Program Chairs' and Deans' (previously the Directors') evaluations of the curriculum staffing needs for the next biennium***: Evaluation of staffing impacts reflects the inputs of multiple proposals from multiple constituents. The goal of pursuing 24 -to- 32 credits of interdisciplinary shared coursework in lower- and upper-division courses reflects the "Connected Learning" paradigm that will preserve the highest number of majors. Faculty, including department chairs, were engaged in the Academic Portfolio Workgroup. While this transformation will require substantive curricular revisions, these workloads will be accounted for in the development of the implementation plan.

e. ***The number of sabbaticals, retirements and other personnel requests that require consideration for staffing***: All current sabbaticals are being honored as previously approved. As such, any back-fill needs for term-by-term faculty for teaching requirements will continue to be supported with this Provisional Vitality Plan. Further, sabbatical applications will continue to be accepted and reviewed in the 2026-27 academic year, but the approval of those applications may be delayed for up to two years. All other personnel requests will continue to be assessed based on the overall financial impact to the institution.

f. ***The dependence of other programs within the University on programs***: Each program proposal was evaluated in the context of the potential impact on other programs. All potential programming changes and submitted proposals were evaluated on these criteria:

- The evaluation process follows a strict "Fiscal Reduction First" logic. While our academic vision provides the direction for our rebuild, it does not alleviate our immediate budgetary constraints. Each proposal had to demonstrate credible, recurring savings beyond its academic or historical merit.
- We upheld accountability by ensuring this process was:
  - **Disciplined:** Applying consistent, data-driven questions to every unit.
  - **Clear-eyed:** Recognizing that outright eliminations were possibly required to prevent institutional failure.
  - **Humane:** Making decisions that were defensible, transparent, and respectful of the colleagues who will remain to lead SOU into the future.
- To be considered viable, a proposal had to contribute a meaningful share of the $8M to $10M target for Academic Affairs. Evaluators needed to prioritize "Curricular Solutions" that leveraged maximizing efficiency.
- Proposal validation processes included these five structured data points:

Data Point	Evaluator Action
Eliminations	List all programs, majors, or certificates to be cut entirely
Redesigns	Verify plans for combined or reconfigured majors
Positions Cut	Count total faculty/staff positions eliminated (FTE)
Cash Savings	Confirm total annual, recurring savings in dollars
Timeline	Audit the specific dates for realizing cost savings

- Analyze Unintended Consequences

  <u>Fiscal Consequences</u>
  Red Flags: Potential for enrollment "free-fall"; loss of downstream revenue; stranded costs (e.g., specialized facilities like ceramics/sculpture buildings); or unresolved contractual obligations.

Cross-Program Impact
Red Flags: Elimination of prerequisites for remaining majors (e.g., how cutting Humanities or Math impacts the School of Education's secondary licensure).

Marketability
Red Flags: Loss of "student audience legibility." Evaluators must reject renaming recognized disciplines to generic titles (e.g., renaming "Theatre" to "Creative Industries") if it makes the program invisible to prospective students.

Regional Partnerships
Red Flags: Damage to the Rogue Valley ecosystem. Evaluators must specifically weigh partnerships, such as OSF, Lithia, Asante, etc.

Workload Sustainability
Red Flags: Proposals that support the current program/curricular complexity or even add to it, including the personnel needed to maintain the level of complexity

- Decision Filters: While these are decision aids rather than rigid algorithms, they required disciplined judgment.

    1. **Cornerstone Fit:** Does the program advance one of the Academic Cornerstones?
        - Bio-Regional
        - Health
        - Creative Arts & Industries
        - Civic Engagement
        - Applied Sciences
        - Professional Studies
    2. **Living Lab Fidelity:** Does the program satisfy at least four of the six principles (Place as Syllabus, Structural Mentorship, Work Produces Work, Time Follows Learning, Eliminating Structural Silos, and Human Equipping and Technology?
    3. **Student-Centric Streamlined Curriculum:** Does the major conform to the Key Principles for Every Academic Program?
    4. **Stewardship:** Is the program financially sustainable at realistic enrollment levels while serving the public mission?

- The "On the Clock" designation: Any program failing to meet at least three of these four filters is considered "on a clock" for redesign or sunsetting. This is not a mechanical dismissal but a mandate for programmatic reconfiguration or elimination within a defined window.

g. ***The ability of existing faculty to cover courses in other programs***: The synthesis of existing majors and minors will require substantive curricular revision. All majors and minors presented in this plan will pull directly from existing faculty expertise, revised programs of study based on many existing courses, and the creation of new shared courses across multiple disciplinary studies. Moving forward, faculty will be required to teach a wide breadth of content.

h. ***The possible reconfiguration of majors or programs of study***: This plan proposes the retention of academic offerings to 31 majors. This alternative to cutting to more majors will require all programs to meet the following expectations by Summer 2027:

- 30 -to- 36 credit lower-division General Education model to reflect statewide model
- Potentially add up to 15 upper-division credits in General Education
- 24 -to- 32 credit lower- and upper-division interdisciplinary shared coursework (6-8 shared courses within or across Academic Cornerstones) to include:
  - Introductory concepts
  - Data literacy
  - Moral and ethical reasoning
  - Cross-cultural collaborations
  - Human and technology interactions
  - Methods and inquiry
  - Practicum/applied learning
  - University integrative capstone
- 60 -to- 80 credits satisfying major requirements, including shared coursework listed above
- Elective credits, minors, etc. to attain 180 total credits to graduate
- General principles of class size management that include:
  - Emphasis on shared curricular efficiencies across programs
  - Generally, target minimum class sizes of 40 in lower division lecture/hybrid courses
  - Generally, target minimum class sizes of 20 in upper division courses
  - Program targets will undergo a holistic evaluation, with some class size ranges being smaller or larger sections
- Connected Learning principles at different stages throughout the curriculum that require work or service experience that is directly connected to their academic experience, such as practicum, internships, campus, or other work experience:
  - Experiential learning early in the program focused on an introductory course in the Academic Cornerstone
  - Interdisciplinary capstone at the end of the program
  - Engaging with living laboratory principles

- Clear degree pathway documents for every major, shifting from lecture to studio: face-to-face class time should focus on debate, troubleshooting, creating, or receiving coaching from faculty
- Clear transfer articulation pathways for every major
- Certificate Curriculum: Redefine the meaning of a certificate at SOU to meet industry-specific needs, focused on employer-recognized skills and what adult learners will take, in addition to streamlining those that bring a value to traditional students throughout their program of study
- Accelerated Pathways: Prioritize 3+1 and 4+1 models
- Clustering and Shared Cores: Adopt the School of Education model (merging MAT/MSEd cores) to reduce low-enrolled course rotations and maximize faculty loading across similar cohorts
- Curricular flexibility: Move content online that is suitable for asynchronous delivery to focus limited in-person resources on high-impact applied and community-based learning (use of the flipped classroom concept, as opposed to the fully online courses concept)
- Exceptions may be made, for example, in programs with licensure requirements

i. ***Balance between academic programs and other services***: In an effort to maintain more majors than outlined in the Deloitte plan, the Academic Affairs division proposes that all programs of study will follow the implementation plan to rework, revise, and recreate shared curriculum across disciplines. This approach, compared to eliminating the 10 lowest-enrolled majors, provides an opportunity to continue serving students through a wide range of academic programs with fewer total faculty. While total faculty numbers will decrease, non-academic programs are undergoing similar levels of cost savings outlined throughout the Provisional Vitality Plan.

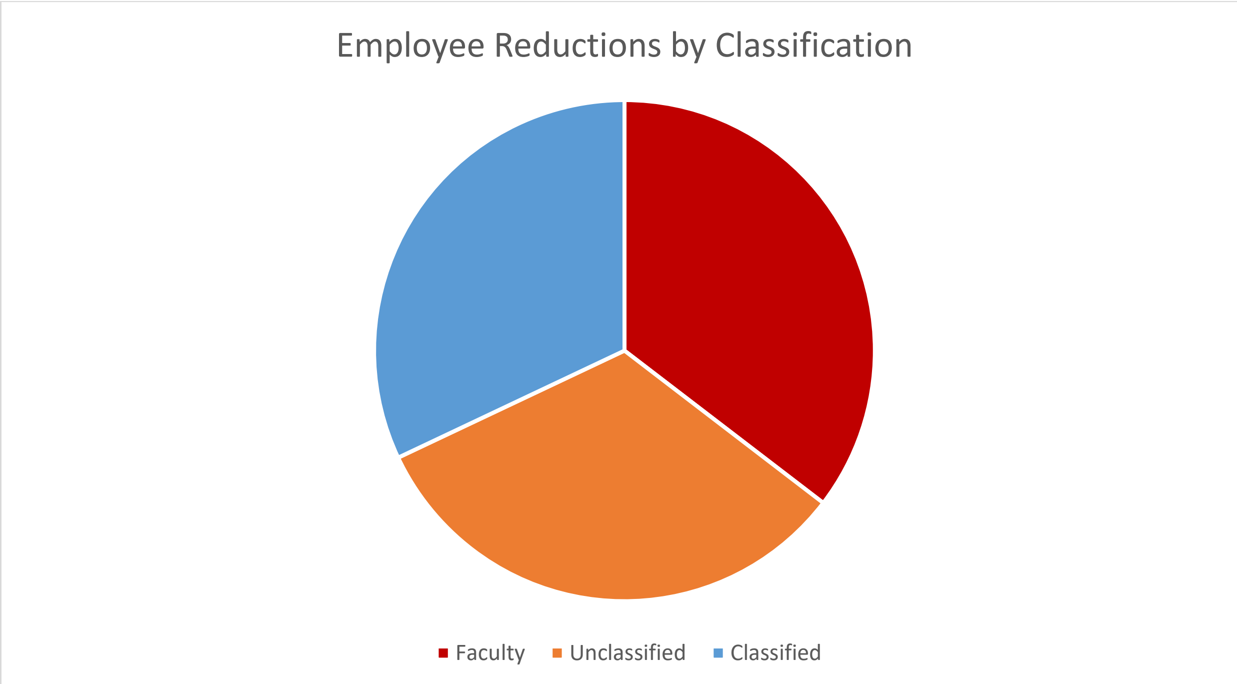
Impact on Workforce

For nearly five consecutive years, SOU has endured painstaking reductions to balance its revenues and expenditures. Taken together, SOU FORWARD, the Resiliency Plan, and the Vitality Plan are marked by difficult but existentially necessary downsizing in order to live within our institutional means. In several public gatherings, we acknowledge that those reductions were not based on the caliber or contributions of any specific individual or groups of individuals. All of our colleagues who have lost their positions over the last several years were dedicated and committed and whose service was valued and respected by the institution. Those colleagues, in addition to our colleagues whose positions are identified for elimination in this plan, are contributing to the long-term ability of our institution to be of service for students now and well into the future.

University leaders are committed to helping all employees, regardless of whether they are departing or will remain on campus. We recognize that healing is needed in order for us to move forward in unison.

To be sure, the emotional impact of these three plans requires an intentional focus on long-term emotional and cultural healing.

TOTAL REDUCTIONS: SOU FORWARD, RESILIENCY PLAN, VITALITY PLAN



	FACULTY	UNCLASSIFIED	CLASSIFIED	TOTALS
SOU FORWARD	27.03	24.75	30.05	81.83
RESILIENCY PLAN	28.00	28.00	14.00	70.00
VITALITY PLAN	20.17	16.45	23.98	60.60
TOTALS	**75.20**	**69.20**	**68.03**	**212.43**
	35%	**33%**	**32%**	**100%**

Projected Savings

The table below provides an overview of the anticipated savings to the General Fund and other institutional funds as a result of the Vitality Plan.

BY AREA	AMOUNT
Vitality Plan	
Academic Portfolio	$4,387,482
Student Affairs and Enrollment Management	$967,205
Administrative Footprint	$3,453,334
Dining Services	$1,100,000
Intercollegiate Athletics	$1,529,662
Farm at SOU	$180,146
Jefferson Public Radio	$172,649
Subtotal Vitality Plan Savings	**$11,790,478**
Resiliency Plan Cost Saving Measures Carryforward	
Planned Resiliency Plan Labor	$5,606,881
Planned Resiliency Plan Service & Supplies	$3,092,723
Unrealizable Resiliency Plan Savings	($462,052)
TOTAL	**$20,028,030**

Revenue Opportunities

In addition to cost savings initiatives in this plan, the university must also consider revenue enhancement opportunities to provide a balanced long-term viability to the financial picture. The following are all items that must be considered in the near-to-middle term:

ENROLLMENT

In February 2026, the Board of Trustees authorized an investment in a contract to conduct highly targeted and sophisticated new student outreach. That process is underway. Along with a redesigned website expected to launch in later summer / early fall 2026 focused exclusively on recruiting prospective students, the initiatives should help the new student pipeline. The institution must also consider strategic investments of future surplus resources (in addition to building fiscal reserves) to marketing and recruitment activities.

RETENTION

The institution must engage in activities designed to increase first-year retention and overall retention rates. Both have traditionally hovered at levels that are better than many institutions but still well below where they need to be. An increase in overall retention will have a dramatic effect on the institution's long-term financial health. Retention efforts must address both the socialization aspect of the student experience (connectedness to other students and the broader community) as well as the financial aspect (exploring unique scholarship opportunities such as housing and dining assistance, or other similar non-tuition student needs)

HOUSING

A significant perennial weight on SOU's overall budget picture stems from the debt service to the student housing project that led to the creation of Raider Village. The Vitality Plan incorporates a reorganization of the university's debt service with the potential of state bonding authority. In the interim, the university plans to use Capital Improvement and Replacement dollars to fix the heating, ventilation, and air condition (HVAC) system in the Music Building. This plan with the debt service would yield an estimated $2.7 million annually in net positive cash flow for the university on a continuing basis.

OLDER ADULT LIVING COMMUNITY (OALC)

One of the four planks of the SOU FORWARD involved exploring revenue diversification opportunities. From that plan, one exciting opportunity that presented itself was the establishment of an older adult living community on the site of the former residential Cascade Complex. In 2025, Cascade Hall was razed with funding from the state, and a formal procurement process led to a potential partnership that was delayed because of external factors unrelated to SOU. In 2026, a renewed focus on the project resurfaced when it was announced that a tract in Ashland (which includes the SOU campus) may be included as a potential Opportunity Zone designation, which would open the door to increased outside funding opportunities for development projects (like the OALC), and likely reinvigorate the project as close to shovel-ready.

PARTNERSHIP WITH CITY OF ASHLAND

In early 2026, the City of Ashland had to vacate its City Hall facility because of structural complications. As the city explores what will likely be a multi-year rehabilitation of that building, there may be opportunities for SOU to partner with the city to locate many of its City Hall offices and spaces to the campus. Consideration must be given for public access (including parking) and office space, in addition to city council meeting and gathering spaces. This may offer a benefit both for city officials and the university.

LA CLINICA

SOU enjoys a prosperous partnership with La Clinica, a non-profit health care provider, to operate the university's Student Health and Wellness Center. With recent changes to the Ashland Community Hospital and the overall access to health care opportunities in the region, there may be an opportunity to expand La Clinica's footprint on the campus, which would also allow it to offer services to SOU faculty and staff in addition to students, and perhaps even to local community members. The increased space requirement could generate a revenue stream for the institution while expanding health care access for the region. La Clinica has expressed interest in an enhanced partnership, and SOU should consider it as soon as practical.

ACADEMIC CALENDAR CONSIDERATIONS

Several inputs from the campus community, most notably including the Academic Portfolio Work Group, proposed that the university consider moving the academic calendar to more closely align with colleges and universities organized by a semester structure (which account for most institutions in the country). An example calendar could still utilize terms, but organized differently (such as starting 10-week terms in mid August, early January, and mid to late March, with extended winter and spring breaks available for intensive synchronous or asynchronous programming). This also would open the possibility for five-week block scheduling, which could unlock academic cornerstone experiential learning. A new calendar could become an attractive alternative for Oregonians and contribute to increased tuition revenue. We acknowledge the desire to gather more information to create a cost-benefit analysis but strongly suggest a university wide exploration of the topic.

Conclusion

As challenging as this process has been, we know that there are still likely to be future challenges to the landscape. State economists have already predicted burdens to state agencies to help fix assumptions made about pension and medical packages over the last few decades that have not panned out. This means that there are still headwinds that we will likely have to navigate as an institution. This plan will position Southern Oregon University for that navigation.

Appendix A: Community Engagement

How Public and Campus Feedback Shaped the Final Plan

A cross-reference of Vitality Plan recommendations to the community, student, faculty, and staff feedback that informed them.

PURPOSE

During the development of the Vitality Plan, Southern Oregon University invited students, faculty, staff, alumni, and community partners to contribute ideas. The venues for collecting these contributions were through two volunteer working groups, facilitated student planning sessions, and an always-on online recommendations portal, as well as a number of stand-alone proposals submitted directly to the university.

This appendix demonstrates that those contributions were heard and incorporated. The intent is transparency: to show the public, in a single place, that the final plan is “a culmination of campus and community inputs” reflecting “a deep review, understanding, and appreciation for all of the inputs received.”

REFERENCE LIST OF FEEDBACK DOCUMENTS

The following fourteen feedback sources informed the Vitality Plan. Each is assigned a reference number (F1–F14) used throughout the appendix and the summary matrix. *NOTE: This is not an exhaustive list, but rather a sample to demonstrate how campus stakeholders influenced the plan’s development.*

F1 — Online Vitality Recommendations Portal: Summary and Raw Data (May 27, 2026)

The university's always-on public feedback portal captured 58 unique submissions across four stakeholder groups: Students (17%), Faculty (25%), Staff/classified & unclassified (33%), and Community/alumni, partners, visitors (19%). Where this document is cited below, the specific stakeholder group is noted in parentheses.

F2 — Academic Portfolio Vitality Working Group Proposal (May 31, 2026)

The recommendations of the faculty/staff working group charged with reshaping the academic portfolio proposes a single Dean of Faculty model, a 'Communiversity' place-based identity, shared/consolidated core curricula, streamlined degree pathways, a reinvented academic calendar, and expanded regional and Tribal partnerships.

F3 — Administrative Footprint and Back-Office Working Group Proposal (May 25, 2026)

Recommendations of the working group charged with the non-academic administrative footprint covers Business Services, IT (including Banner sunset), Facilities, Campus Public Safety (CPS), HR, Budget/Institutional Research (IR), shared-services and consortium models, and a post-graduate work program.

F4 — Student Vitality Planning Sessions Report (May 22, 2026)

The synthesis of two facilitated student workshops prepared by the Assistant Vice President (AVP) of Student Affairs & Dean of Students organizes student input into five strategic pillars and a reduce / consolidate / eliminate / redesign framework, with specific concepts for advising, general education, affordability, and regional partnerships.

F5 — The Bioregional University of Applied Practice White Paper (May 2026)

A community/industry white paper proposes that SOU organize its retained programs around a unifying bioregional, applied, AI-aware strategic identity built on a set of cross-disciplinary 'anchors,' while still meeting the $20M savings target.

F6 — Music Department Workgroup Ideas

The music faculty brainstorming document (explicitly non-binding ideas pending a faculty vote) proposes consolidation of music degrees, online/hybrid delivery, migration of audio/production work toward Emerging Media & Digital Arts, scholarship-fund consolidation, and a conservatory model.

F7 — Ideas for the Theatre Department

An advocacy and growth proposal for the Theatre program argues against faculty-line cuts and outlines revenue expansion through camps, certificates, professional/workforce training, and recruitment.

F8 — SOU Music Program Curriculum Proposal (community member)

A community member proposes to refocus the Music program on practical, industry-centric, conservatory-style training (modeled on AMDA/CalArts), with reduced theory/history, performance and technology emphasis, and collaboration with the Theatre Department.

F9 — Proposal for a Regional Cooperative Dining and Procurement Model

This proposal explores a regional cooperative dining and food-procurement model leveraging local restaurants, Rogue Valley farms, existing culinary staff, and partners such as Rogue Valley Farm to School.

F10 — Public Data Center Colocation Facility Proposal (May 18, 2026)

This proposal recommends sharing data-center infrastructure and costs by co-locating SOU servers with another public entity (e.g., Ashland School District or Rogue Community College), and/or leasing SOU data-center space as revenue.

F11 — SOU / La Clinica / City of Ashland Partnership Opportunity (May 20, 2026)

A community partnership concept proposes to expand the SOU/La Clinica Student Health & Wellness Center into a regional healthcare and health-professions training hub, with behavioral-health workforce development and possible relocation to Britt Hall.

F12 — The Future is at SOU — Creative Arts, Climate Action & Sustainability Innovation Initiative

This community proposal recommends connecting SOU’s at-risk creative-arts and sustainability programs into an interdisciplinary, community-facing institute with certificates, consulting, and regional partnerships.

F13 — The SOU Honors College of the Siskiyous

This proposal reimagines the Honors Program as a place-based 'Honors College of the Siskiyous,' with a streamlined 42-credit honors general-education curriculum, a Native American Studies thread, experiential 'Take the Lead' projects, and a low/no-cost endowed-chair governance model.

F14 — ASSOU Student Townhall with the President and Provost (June 3, 2026)

A student town hall hosted by the Associated Students of Southern Oregon University (ASSOU) with the President and Provost generated student ideas, including consolidation of lower-division courses; more flexible and streamlined student pathways; reducing time to degree completion; artificial-intelligence governance, ethics, and usage; and a human-centered approach to education.

SECTION-BY-SECTION CROSS-REFERENCE

Each entry below pairs a recommendation from the Vitality Plan with the feedback document(s) in which the corresponding idea appears. Citations use the reference numbers from the list above.

1. An Inclusive, Transparent Process

The plan's Strategy and Approach describes two working groups (academic portfolio and administrative footprint), facilitated student dialogues, and an always-on feedback portal whose outputs were reviewed and incorporated. Those very channels are the feedback documents catalogued here.

- **Two volunteer working groups — one on the academic portfolio, one on the administrative footprint** — *Reflected in: F2 (Academic Portfolio Working Group); F3 (Administrative Footprint Working Group)*
- **Facilitated dialogues with student volunteers** — *Reflected in: F4 (Student Vitality Planning Sessions)*
- **An always-on feedback portal open to all campus and community contributors** — *Reflected in: F1 (Recommendations Portal — all groups)*
- **Genuine respect for, and a deep review of, all contributions; concern that community voices be heard** — *Reflected in: F1 (Community — 'lack of focus on the community'; frustration about prior input not acknowledged); F4*

2. A Distinctive Identity: Becoming "Undeniably Distinctive"

The plan's conclusion that SOU "cannot survive as a generic public regional university" and must instead become distinctive, leaning into place, mirrors a recurring theme across the feedback.

- **SOU must build from its distinctive strengths rather than competing on scale; 'cannot cut its way to greatness'** — *Reflected in: F1 (Students & Faculty — lean into distinctiveness: small classes, faculty relationships, regional/outdoor identity); F4 (preserve distinctive identity)*
- **Stop solving 21st-century challenges with 20th-century systems; pursue a frame-breaking, place-based model** — *Reflected in: F5 (designing 'backwards from the future,' bioregional applied identity); F2 ('Communiversity' place-based model)*
- **Reject a 'generic online institution'; the valley is a competitive edge to lean into** — *Reflected in: F1 (Staff & Faculty — balance online growth with place-based identity)*

3. Mission and Vision

The proposed mission (Rogue Valley as classroom, mentorship as method, experiential work as curriculum) and vision (small by choice, distinctive by design, rooted in place, producing graduates with capacities no machine can replicate) draw directly on feedback themes.

- **Place / the Rogue Valley as the pedagogy (bioregional, applied, experiential)** — *Reflected in: F5 (bioregional applied lens); F2 (place-based 'Communiversity,' co-op experiential model); F4 (place-based, experiential learning); F13 ('Rooted in Place')*
- **Mentorship and small-scale, known-by-name education as a premium asset** — *Reflected in: F2 ('College of Community & Belonging,' small classes as a premium asset); F1 (small classes & faculty relationships); F4 (protect advising and faculty/student connection)*

- **Human capacities that AI cannot replace as the graduate's value proposition** — *Reflected in: F5 (AI as the 'missing variable'; equip graduates to use AI); F4 (protect distinctly human supports); F14 (human-centered education)*

4. Community Connectedness

The plan's commitment to operationalize community connectivity — tying academic and student activity directly to regional businesses, agencies, and organizations — echoes a strong community-engagement thread in the feedback, including several stand-alone partnership proposals.

- **Engage the community directly and bring outside partners 'to the table'** — *Reflected in: F1 (Community — local business/arts/innovation working groups; 'bring at least $2M from partnerships'); F4 (community-integrated campus model)*
- **Concrete community partnership proposals received and reflected in this direction** — *Reflected in: F9 (regional cooperative dining/procurement); F11 (La Clinica health-professions hub); F10 (shared public data center); F12 (creative-arts & sustainability institute)*
- **Regional employers engaged as strategic partners (e.g., Lithia, Harry & David, Asante, Providence, Medford School District)** — *Reflected in: F1 (Community — bring regional employers into planning); F4 (regional employer pipelines)*

5. Streamlined Degree Pathways and Flexible Options

The plan's initiatives for streamlined pathways to degree completion in every discipline closely track student, staff, faculty, and working-group recommendations.

- **Degree-in-3, 3+1 and 4+1 accelerated and stackable models; reduce time to degree completion** — *Reflected in: F2 (degree-in-three); F1 (Faculty/Staff — accelerated formats, stackable graduate certificates); F14 (streamlined pathways; reducing time to degree completion)*
- **Streamlined / shared core curricula across majors; consolidate lower-division courses** — *Reflected in: F2 (combine core classes — research methods, statistics, practicum; shared cores); F1 (Faculty — interdisciplinary departments, streamlined majors); F4 (interdisciplinary consolidation); F14 (consolidation of lower-division courses)*
- **More flexible student pathways and options** — *Reflected in: F1 (Staff/Faculty — hyflex, accelerated, flexible delivery); F4 (flexible/hybrid models); F14 (more flexible student pathways)*
- **Curricular flexibility — move suitable content online/asynchronous; flipped-classroom focus** — *Reflected in: F1 (Staff — hyflex campus; Faculty — flipped/hybrid; the self-directed online curriculum suggestion); F6 (online/hybrid delivery)*
- **Adapt General Education to the statewide pattern (return to GE 'buckets'/leverage Associate of Arts Oregon Transfer (AAOT) and ease pathway navigation** — *Reflected in: F2 (simplify GE on the AAOT model); F1 (Faculty — scale back gen ed); F4 (general-education redesign)*
- **Clear degree-pathway documents and transfer articulation for every major** — *Reflected in: F1 (Students — written assurance of required courses/advising); F2 (AAOT-aligned seamless transfer); F4 (increased transfer flexibility)*

6. Human-Connected Approach to Technology and AI

The plan's emphasis on human connection alongside intentional engagement with AI reflects both enthusiasm for, and caution about, technology in the feedback.

- **Expose students to AI and equip them to engage, adapt to, and design emerging technologies; address AI governance, ethics, and usage** — *Reflected in: F5 (position graduates to wield AI tools); F2 (AI-literacy component paired with human-to-human interaction); F14 (AI governance, ethics, and usage)*
- **Celebrate human connection as central to education alongside technology** — *Reflected in: F5; F2; F14 (human-centered education)*
- **Use AI/data tools thoughtfully for advising and operations, with appropriate caution** — *Reflected in: F1 (Faculty — AI-supported advising); F3 (measured discussion of AI's value and limits in operations)*

7. A Leaner Academic Structure — Single Dean of Faculty and Chairs-Led Consultation

The plan replaces the multiple-dean model in favor of a single Dean of Faculty reporting to the Provost and working directly with department chairs. This is one of the most directly sourced recommendations in the feedback.

- **Replace the multiple-dean model with a single 'Dean of Faculty' reporting to the Provost, working directly with chairs** — *Reflected in: F2 (explicit single Dean of Faculty recommendation); F3 (Dean of Faculty; eliminate deans)*
- **Reduce academic administration / deans and restore faculty leadership closest to students** — *Reflected in: F1 (Faculty — 'Eliminate Deans and SSCs; downsize academic administrators); F4 (reduce middle-management layers)*
- **Eliminate structural silos through a flatter, more agile structure that can pivot programs quickly** — *Reflected in: F2 (curricular agility; remove multi-year approval barriers); F1 (Faculty — interdisciplinary, de-siloed structure)*

8. The Rogue Valley Living Laboratory (Six Principles)

The Living Laboratory pedagogical model — place as syllabus, structural mentorship, work-produces-work portfolios, a flexible calendar, eliminated silos, and human-equipping with technology — synthesizes several feedback streams.

- **Place is the syllabus; bioregional, applied learning across every program** — *Reflected in: F5 (bioregional applied practice; white paper place-based model, also named in F1 Faculty input); F2 (place-based, regionally responsive)*
- **Mentorship is structural; portfolios of public-facing work as the real transcript** — *Reflected in: F13 (experiential 'Take the Lead' projects, senior portfolio); F2 (mentor where it matters; transdisciplinary capstones)*
- **Time follows learning — flexible calendar with intensive/immersive blocks** — *Reflected in: F2 (5-week modular block scheduling; reinvented academic calendar); F1 (Faculty — accelerated 5-/8-week sessions, Old Dominion model)*
- **Structural silos eliminated through interdisciplinary, shared work** — *Reflected in: F1 (Student — umbrella Social Science structure; Faculty — interdisciplinary departments); F5 (re-mixable cross-disciplinary anchors)*
- **Human-equipping and technology — cultivate judgment, creativity, ethics, plus AI fluency** — *Reflected in: F5; F2 (human-to-human plus AI literacy)*

9. Required Key Principles for Every Academic Program

The required program principles — class-size management, stackable/accelerated pathways, shared cores, certificate redesign, and flexible delivery — track the working-group and portal recommendations.

- **General principles of class-size management with holistic evaluation** — *Reflected in: F1 (Faculty — concern that an 18-student minimum was too high; plan responds with a holistic, exception-aware approach); F2 (larger shared sections, split-level courses)*
- **Certificate curriculum redefined for employer-recognized, industry-specific skills** — *Reflected in: F1 (Students/Staff — stackable graduate certificates, employer cohorts, Credit for Prior Learning); F2 (workforce-aligned credentials)*
- **Clustering and shared cores to reduce low-enrolled courses** — *Reflected in: F2 (consolidate duplicative courses; shared cores); F4 (academic-portfolio consolidation); F14 (consolidation of lower-division courses)*
- **Quarterly chairs training and chairs-led academic decision-making** — *Reflected in: F3 (chairs/directors given budget tools and accountability); F2 (chairs work directly with the Dean of Faculty)*

10. The Academic Cornerstones

The plan organizes the portfolio around six Academic Cornerstones (Bio-Regional, Health, Creative Arts & Industries, Civic Engagement, Applied Sciences, Professional Studies). The structure of unifying, cross-disciplinary 'anchors' was explicitly proposed in the feedback.

- **Organize programs as cross-disciplinary cornerstones rather than siloed departments** — *Reflected in: F5 (the five 'Anchors': Applied Technology, Applied Enterprise, Applied Bioregional Ecology, Applied Creative Economy, Applied Human Services)*
- **Connect creative arts, sustainability, and civic/community engagement into integrated pathways** — *Reflected in: F12 (interdisciplinary creative-arts + climate/sustainability ecosystem)*

11. Program Portfolio Decisions (Retentions, Reconfigurations, and Sunsets)

Specific program decisions in the plan align with named recommendations in the feedback. Several retentions reflect direct community and faculty advocacy.

- **Music major retained but streamlined; Music Industry & Production sunset; creative pathways preserved via EMDA and digital cinema** — *Reflected in: F6 (consolidate music degrees; migrate audio/production toward EMDA); F5 (music audio/production migrate into EMDA); F8 (industry-centric conservatory refocus); F1 (Faculty — merge MIPS/vocal toward musical theatre)*
- **Pre-nursing students given a permanent home in the new Biology & Chemistry department** — *Reflected in: F1 (Faculty — detailed proposal to house Pre-nursing in Biology & Chemistry)*
- **Financial Mathematics sunset; resources concentrated in Mathematics, Computer Science, Data Science, Applied Economics** — *Reflected in: F1 (Faculty — preserve shared upper-division quantitative infrastructure; 'Computer and Data Science' structure); F5 (Math retained as a service unit; Economics folded into Applied Enterprise)*
- **Gender, Sexuality & Women's Studies (GSWS) retained as a standalone minor** — *Reflected in: F1 (Faculty — detailed case to retain GSWS in a modified, financially sustainable form)*

- **Native American Studies retained as a standalone minor** — *Reflected in: F1 (Students — 'Do not cut Native American Studies' (NAS)); F13 (Native American Studies thread/certificate); F4 (Native American-serving institution exploration)*
- **Social Science programs consolidated into one department (Criminology, History, Sociology/Anthropology with GSWS/NAS minors)** — *Reflected in: F1 (Student — umbrella 'Social Science' degree; Faculty — interdisciplinary social-science foundation)*
- **Human Service degree sunsets, and focus on a new Pre-Counseling certificate; Clinical Mental Health Counseling (CMHC) and behavioral-health pathways retained** — *Reflected in: F1 (Faculty — grow CMHC, community clinic, behavioral-health pathways); F5 (Applied Human Services anchor); F11 (behavioral-health workforce development)*
- **Theatre retained (Theatre Production & Design; Master's in Theatre)** — *Reflected in: F7 (Theatre growth/anti-cut proposal); F8 (Theatre collaboration); F1 (Community — preserve theatre as a cultural anchor)*

12. Student Affairs, Advising, and Enrollment Services

The plan centralizes advising, reduces and cross-trains Student Success Coordinators, and refocuses enrollment resources — closely matching staff, faculty, and student recommendations.

- **Centralize advising and cross-train across SSCs, faculty, TRiO, University Coaching and Mentoring (UCAM,) Bridge, and first-year support** — *Reflected in: F1 (Staff — centralize academic support, cross-train advising teams; Faculty — reduce SSCs); F4 (centralized professional advising model / 'Student Success Center'); F3 (shift more advising to faculty)*
- **Move SSCs to a centralized model with equitably distributed caseloads** — *Reflected in: F1 (Staff — end advising silos/duplication); F2 (reduce duplication)*
- **Youth Programs moves toward self-sustaining auxiliary; build recruitment pipelines via early-college and summer pathways** — *Reflected in: F2 (expanded summer programming; high-school credit pathways); F1 (Staff — UNCSA-style high-school senior program; on-site charter school pipeline)*

13. Administrative Footprint and Back-Office Reorganization

The plan's reorganization of Business Services into a Business Intelligence Office, IT restructuring, Service Center elimination, shared-services exploration, and software contract elimination tracks the Administrative Footprint group and portal feedback in detail.

- **Reorganize Business Services around data integrity, analysis, and reporting (Business Intelligence Office)** — *Reflected in: F1 (Staff — use predictive analytics/data for scheduling; regulate irregular registrations); F3 (push budget ownership to departments; OpenLedger tool); F4 (institutional efficiency)*
- **IT restructuring (dual CIO/CISO position; prioritize cybersecurity and client services; leaner staffing)** — *Reflected in: F3 (consolidate IT management; outsource select functions; student workers)*
- **Eliminate the Service Center and redistribute its functions across the university** — *Reflected in: F3 (outsource/remove the Service Center; disperse functions back to departments)*

- **Explore shared/consortium services with other Oregon universities (EOU, WOU)** — *Reflected in: F3 (anchor/consortium model; shared HR/IT/legal with partners); F1 (Faculty — shared services, RCC partnership emphasis)*
- **Eliminate Banner-related software contracts (>$1M)** — *Reflected in: F3 (sunset Banner — ~$1.2M savings)*

14. University Advancement and Philanthropy

The plan's continued reliance on philanthropy and the SOU Foundation, and its commitment to reinvest in development, reflect donor-focused suggestions in the feedback.

- **Use donor and Foundation support to sustain ongoing program operations (e.g., annual unrestricted gifts)** — *Reflected in: F1 (Students/Community — donors fund ongoing operations for music, athletics, arts); F8/F6 (music philanthropy and scholarship-fund consolidation)*
- **Focus the SOU Foundation on new opportunities such as endowed chairs** — *Reflected in: F2 (endowed faculty/chairs); F13 (endowed chair of Honors)*

15. Auxiliary Enterprises

The plan proposes new fiscal models for Housing & Dining, Athletics, the SOU Farm, JPR, the Schneider Museum, Youth Programs, and the Medford Higher Education Center — areas addressed across the feedback.

- **Housing & Dining: pricing/efficiency changes and community-integrated dining models** — *Reflected in: F9 (regional cooperative dining & procurement model); F1/F4 (dining and auxiliary partnerships); F2 (student-run dining)*
- **Athletics moves toward self-sustainability via cost reductions and philanthropy (e.g., graduate-assistant coaching)** — *Reflected in: F1 (Students — protect athletics but fund via donors; student-coach intern program; eliminate Assistant Director, Sports Information)*
- **SOU Farm transition to a self-support auxiliary with regional non-profit/for-profit partners** — *Reflected in: F9 (Rogue Valley Farm to School partnership); F1 (Community — Rogue Valley Food System partnership); F12 (sustainability programming)*
- **Higher Education Center, Medford — updated, expanded partnership with Rogue Community College** — *Reflected in: F1/F4 (prioritize RCC partnerships); F10 (RCC as a shared-infrastructure partner)*

16. Workforce Reductions Handled with Compassion

The plan's emphasis on achieving reductions through vacancies, voluntary measures, and retirements — and its focus on dignity and healing — reflects 'people-centered' suggestions in the feedback.

- **Prioritize voluntary separations and early-retirement incentives before involuntary layoffs** — *Reflected in: F1 (Staff — voluntary separation, early-retirement/buyout incentives, shared reductions); F2 (retirement-based line reductions; extend health insurance to incentivize early retirement)*
- **Consider flexible models (reduced contracts, 10-month operations, remote/reduced-hour options)** — *Reflected in: F1 (Staff — 10-month operations, remote-work-for-pay-reduction, 32-hour week for staff-students)*

- **Center dignity, morale, and long-term cultural healing** — *Reflected in: F1 (Staff — compassion and choice in the process); F4 (protect community and belonging)*

17. Facilities Footprint and Shared Responsibility

The plan's smaller facilities footprint, shared responsibility for campus facilities, and debt restructuring align with feedback on space, buildings, and operating costs.

- **Shrink the physical footprint; consolidate, sell, lease, or repurpose underused buildings and land** — *Reflected in: F1 (Community/Faculty — sell/lease land and buildings; reduce the 175-acre footprint); F2 (sell/rent buildings; City of Ashland as a renter); F3 (reduce buildings in use; close campus one day/week)*
- **Share facilities/services and explore co-location to reduce costs** — *Reflected in: F10 (shared public data center / lease SOU data-center space); F3 (shared FMP services with City of Ashland & ASD)*

18. Transparency and Accountability

The plan's guiding principle of transparency, and departmental accountability for results, reflect repeated calls in the feedback.

- **Publish transparent progress reporting (savings, enrollment, retention, service levels, risks)** — *Reflected in: F1 (Students/Community — public dashboard and monthly reporting); F4 (transparency & accountability pillar); F3 (make the process public)*
- **Hold departments accountable for measurable academic and financial objectives** — *Reflected in: F1 (Students — set/track objectives by department; Staff — data-driven accountability); F3 (departments need 'skin in the game')*

PROPOSALS RECEIVED AND HELD FOR FUTURE CONSIDERATION

Consistent with the plan's stated practice of placing promising ideas that did not yet show immediate recurring savings into a 'parking lot' for future consideration, the following community and campus proposals were received and reviewed. Several remain under active exploration as future potential partnerships (for example, healthcare, dining, shared services, and data-center collaboration).

- **Merger or system-level restructuring** — *Reflected in: F1 (Students/Community — possible merger with PSU; a California-style UC system for Oregon; specialized statewide campuses)*
- **On-site community charter school as a teaching lab and pipeline** — *Reflected in: F1 (Staff)*
- **Shared public data center / co-location with ASD or RCC** — *Reflected in: F10*
- **SOU/La Clinica/City of Ashland health-professions hub (Britt Hall)** — *Reflected in: F11*
- **Creative Arts, Climate Action & Sustainability Innovation Institute** — *Reflected in: F12*
- **Honors College of the Siskiyous (expanded model)** — *Reflected in: F13*
- **Centralized SOU call center; Native American-Serving Institution designation; non-profit banking/postage savings** — *Reflected in: F1*