SOU Strategic Plan – January 2019 Progress Report

Executive Summary

The SOU Strategic Plan was adopted in January of 2018 after an expansive effort by the Strategic Planning Committee. Full text of the plan, its seven Strategic Directions (SD), and their goals can be found on the President's [web site](). Overall, 22 goals extend across the seven directions and six of these were identified as immediate priorities (see below). According to the criteria used, the priority goals are those that most help the institution financially, have the biggest impact on students and employees, could be achieved with current resources, and/or should start immediately due to the time required.

Current Priority Goals:

1. SOU will develop curriculum and provide learning experiences that prepare all learners for life and work in an evolving future; connect directly with the challenges of our community, region, and world; and build self-confidence and the capacity to think critically, innovate boldly, and create lives of purpose. (SD 1.2)
2. SOU will develop effective orientation, training and professional development programs as well as a performance management process that rewards employees for continuous improvement. (SD 2.1)
3. SOU will design and implement a program that will develop a culture of service excellence in all employees. (SD 2.4)
4. SOU will establish supportive pathways that will increase the access, retention, and success of learners (students, faculty, and staff) from underrepresented backgrounds. (SD 4.2)
5. SOU will develop, implement and monitor a comprehensive strategic enrollment management plan. (SD 5.1)
6. SOU will develop key performance indicators to incentivize, monitor, and reward improvements, innovations or efficiencies. (SD 5.2)

The priority goals guide the institution's immediate efforts to execute the Strategic Plan. The first step has been to define specific plans needed to address these priorities, simultaneously recognizing many other efforts across campus related to non-priority goals are occurring. These efforts are also documented. Each Strategic Direction has been assigned a sponsor responsible for defining the objectives needed to achieve its goals. Each objective is then more specifically defined to include how and when it should be measured, who is responsible for the work, and whether the identified target for that assessment was met or not.

To date, and taken all together, the seven Strategic Directions include 30 defined objectives and within these objectives, 51 specific means of assessment are actively being tracked. Nine of those 51 assessments have already been completed, 18 are started but not yet complete, and 24 have yet to begin. When quantifying the progress of only the six priority goals, 24 objectives have been defined and include 37 assessments. Of those 37, seven have been completed, seven have been started and the remaining 23 will be under way soon.

It is anticipated that many more objectives for these priority goals will be defined and tracked over the course of the academic year. Similarly, future academic years will see other goals assigned priority status, with new objectives defined, giving the institution a living document to guide future efforts to execute the overall plan. In addition, academic and academic support programs will continue to map their internal outcomes to the goals of the Strategic Directions as part of their ongoing assessment work. While this is SOU's first endeavor to accurately and continuously monitor a strategic plan, the assessment software is already well established on campus and allows us to demonstrate the clear integration between the Strategic Plan, Accreditation core themes, and individual program outcomes. This integration is one of the key measures NWCCU uses in accrediting the institution and confirming that the institution is fulfilling its mission.

SOU will transform its pedagogy and curriculum (how and what it teaches) to enhance the success of its learners and graduates.

Goal One [priority]: SOU will develop curriculum and provide learning experiences that prepare all learners for life and work in an evolving future; connect directly with the challenges of our community, region, and world; and build self-confidence and the capacity to think critically, innovate boldly, and create lives of purpose.

Work on this goal began with an inventory of existing programs and practices, as well as of those that are currently in development. We continue to provide opportunities to educate the campus about the dynamic and rapid changes occurring in higher education. This summer we held two four-hour workshops for Academic Program Chairs and Directors, followed by an Academic Directors retreat where we provided materials relevant to Strategic Direction I, focusing specifically on current scholarship on pedagogy and curriculum. Assigned readings and activities examined current and future trends in curriculum development, retention, adult learners, models of adaptive leadership/adaptive change, general education revision, high-impact teaching practices, and effective pedagogy and course redesign.

We are also providing faculty and staff with professional development centering on the future of higher education (e.g., webinars and conferences), and hosted George Mehaffy from AASCU to speak to SOU faculty, staff and students about that topic last May. We will continue to seek out other thought leaders for visits to campus. We are also maintaining a digital repository of links to articles, videos, and webinars to allow faculty/staff access to all relevant materials pertaining to these important issues.

We continue to explore ways to institutionalize best practices related to student success--particularly for first year students--through our involvement in research on Belonging/Growth Mindset and Adverse Childhood Experiences. Last summer, we brought together over 50 people from across campus for a two-hour meeting to identify opportunities to operationalize the findings from those and other student success initiatives, and to connect these to the aspects of pedagogy and curricular development identified in this strategic direction. An all-campus retention summit is planned for winter term, where we will present the work that is under way, and identify areas where further work is needed. As noted in Strategic Direction V, Goal One, SOU's implementation of the Student Success Collaborative system will likely inform new pedagogies that respond to specific populations of students.

We remain focused on growing new student populations, including adult learners. We will add two new concentrations to our online MBA program in 2019. We are developing an online Master in Education program, with four concentrations, to begin in Fall 2019. Our Innovation and Leadership major, designed for working adults, will also be fully available online in 2019.

Progress toward the other goals is also being made. On Goal Two, we will continue having conversations about: 1) expanding the faculty reward system beyond the three traditional areas of scholarship, teaching and service, including but not limited to efforts at increasing retention and, 2) revising performance expectations for post-tenure faculty. Goal Three work focuses on making Open Education Resources and other affordable instructional materials available to students. Goal Four relates to continuous improvement. Annual academic program assessment is ongoing and we are developing a new framework for annual academic program review. Five majors will serve as pilots in Spring 2019 and the reviews will include analysis of major migration, enrollment trends, student learning outcomes, and external demand.

Strategic Plan Progress Report - Detail

Strategic Direction 1 - Transform Pedagogy & Curriculum

Assessment Coordinator: Sue Walsh - Strategic Direction 1 Sponsor
Next Program Review: 2018 2019
Program Notes: SOU will transform its pedagogy and curriculum (how and what it teaches) to enhance the success of its learners and graduates.

<mark>Strategic Plan Priority Goal</mark> (AY 2018-19) - 1.1 - SOU will develop curriculum and provide learning experiences that prepare all learners for life and work in an evolving future; connect directly with the challenges of our community, region, and world; and build self-confidence and the capacity to think critically, innovate boldly, and create lives of purpose.

Objectives	Means of Assessment	Results	Actions Taken
1 - Transform pedagogy and curriculum: Analysis - Study best practices in pedagogy and curriculum **Objective Status:** Active **Assessment Year(s):** 2017 2018	**Process Analysis -** PLC focusing on general education **Target:** Convene PLC, conduct research, analyze, and disseminate findings **Assessment Status:** Assessment Started but not Completed	**Reporting Period:** 2016 2017 **Result Type:** Target Met Sample (12/10/2018)	**Action Taken:** Sample (12/10/2018)
	Process Analysis - PLC focusing on upper division education **Target:** Convene PLC, research, analyze, and disseminate findings **Assessment Status:** Assessment Started but not Completed		
	Task - Conduct curricular audit **Target:** Curriculum audited **Notes:** New curriculum informed by PLC findings **Assessment Status:** Assessment Not Started Yet		
	Task - Revise structure and content of curriculum **Target:** New curriculum		

Objectives	Means of Assessment	Results	Actions Taken
	implemented **Notes:** Revised curriculum informed by both PLC findings and research of best practices **Assessment Status:** Assessment Not Started Yet		
2 - Transform pedagogy and curriculum: Implementation - Implement and/or revise pedagogy and curriculum **Objective Status:** Active **Assessment Year(s):** 2017 2018	**Task -** Implement general education curriculum **Target:** Gen Ed curriculum implemented **Assessment Status:** Assessment Not Started Yet		
	Task - Implement upper division curriculum **Target:** Curriculum implemented **Assessment Status:** Assessment Not Started Yet		
3 - Inventory Learning Experiences - Identify and create curricular and co-curricular opportunities **Objective Status:** Active **Assessment Year(s):** 2018 2019	**Task -** Catalog opportunities to "connect to community, region, world" **Target:** Catalog established **Assessment Status:** Assessment Completed	**Reporting Period:** 2018 2019 **Result Type:** Target Met First draft of inventory complete. (see attached doc) (12/28/2018) **Related Documents:** SD1Goal One Inventory of Learning Experiences.docx	
	Task - Catalog opportunities to "think critically" **Target:** Catalog established **Assessment Status:** Assessment Completed	**Reporting Period:** 2018 2019 **Result Type:** Target Met First draft of inventory complete. (see attached doc) (01/07/2019) **Related Documents:** SD1Goal One Inventory of Learning Experiences.docx	
	Task - Catalog opportunities to "innovate boldly" **Target:** Catalog established **Assessment Status:** Assessment Completed	**Reporting Period:** 2018 2019 **Result Type:** Target Met First draft of inventory complete. (see attached doc) (01/07/2019) **Related Documents:** SD1Goal One Inventory of Learning Experiences.docx	
	Task - Catalog opportunities to "create lives of purpose" **Target:** Catalog established **Assessment Status:** Assessment	**Reporting Period:** 2018 2019 **Result Type:** Target Met First draft of inventory complete. (see attached doc) (01/07/2019)	

Objectives	Means of Assessment	Results	Actions Taken
	Completed	**Related Documents:** SD1Goal One Inventory of Learning Experiences.docx	
4 - Academic Program Review - Establish process and schedule for APR **Objective Status:** Active **Assessment Year(s):** 2018 2019	**Task -** Delegate Work Group to develop formal work process **Target:** Work group convened **Notes:** A schedule of academic programs with expected years for their review will be identified **Assessment Status:** Assessment Not Started Yet		
	Task - Implement APR schedule and process **Target:** Review from the identified programs completed on schedule **Assessment Status:** Assessment Not Started Yet		

SOU will become an employer of choice and provide excellent service to all of its constituents.

Goal One [priority]: SOU will develop effective orientation, training and professional development programs as well as a performance management process that rewards employees for continuous improvement.

Goal Four [priority]: SOU will design and implement a program that will develop a culture of service excellence in all employees.

Planning and implementation of Goal One has been led by the Director of Human Resources Services. The primary activity for this goal has been the development of a new employee orientation/on-boarding program which was implemented on January 7th, 2019. In addition, professional development program improvements were identified based on results of customer survey administered to all staff on campus in 2018. The results indicated that SOU employees wanted both online and traditional, in-person training and professional development opportunities. A team has also been formed to provide feedback on existing or "legacy" performance management processes and to develop alternatives where needed. The intent is to develop these processes, providing training to managers to apply them, and eventually implement a simpler, timelier and more efficient system for performance evaluation and management.

The Vice President of Finance and Administration leads implementation of Goal Four, focused on service excellence. In Spring 2018, a Service Excellence Work Group was convened to develop a framework for implementation of this goal, including a Manager's "Toolkit," training materials, and procedures for recognition of excellent customer service by SOU employees. The team focused on understanding and defining the "culture" of service excellence, and developing four values (Knowledge, Teamwork, Accountability and Quality Service) that represent the initiative and its goals. The framework was presented to SOU Cabinet and Executive Council for approval, and the toolkit was subsequently rolled out to Directors in Business Affairs and Academic Affairs Councils.

The toolkit is the principal teaching resource for this goal. It provides ideas and templates for incorporating the culture of service excellence into SOU programs. It also emphasizes teaching and modeling by leaders and managers. The toolkit also supports the development of a common language related to service excellence, and is intended to result in improved service delivery across SOU.

Various recognition methods were also developed, including branded stationery for hand-written notes of appreciation between employees, and a coin for presentation to employees who have achieved service excellence. Recognition events (in which coins have been awarded to employees) have been both public and private, with 11 coins being presented to date. Goals of these initiatives are acknowledgement of merit, improvement in teamwork, and increasing employee morale.

Over the next six months, training will continue for key campus leaders, including the new VP for Enrollment Management and Student Affairs. Emphasizing that this Strategic Direction involves a process of continuous improvement and evaluation, an Institutional Effectiveness (IE) team has been established. This team will work cross-functionally with the previously-convened IE Committee to support managers through corrective action planning and implementation, risk management, process improvement and the development of key performance indicators (KPIs). KPIs will be developed to ensure assessment and tracking of progress in implementing the Strategic Plan. In addition, a system to identify, resolve, track, and communicate service excellence opportunities is currently being developed. Upon completion, the system will be introduced to the university community.

Strategic Plan Progress Report - Detail

Strategic Direction 2 - Become an Employer of Choice that Provides Excellent Service

Assessment Coordinator: Greg Perkinson - Strategic Direction 2 Sponsor
Next Program Review: 2018 2019
Program Notes: SOU will become an employer of choice and provide excellent service to all of its constituents.

Strategic Plan Priority Goal (AY 2018-19) - 2.1 - SOU will develop effective orientation, training and professional development programs as well as a performance management process that rewards employees for continuous improvement.

Objectives	Means of Assessment	Results	Actions Taken
Training and mentoring - Provide all new employees training and mentoring in areas specific to their work **Objective Status:** Active **Assessment Year(s):** 2017 2018, 2018 2019 **Start Date:** 07/02/2018 **End Date:** 11/30/2018	**Task -** Provide position specific training **Target:** For example, CBA awareness training, dept chair training, resource training and Program Assistant training (standardize best practice) **Notes:** Need to ensure employees receive recurring training on policy / standards (tool for administering training and record completion of training) **Assessment Status:** Assessment Not Started Yet		
	Task - Provide access to computer based / in-person development and training **Target:** Get programs like "Lynda.com/LinkedIn Learning" online; includes micro-sessions; Partner with outreach and engagement to offer in-person		

Assessment Status: Assessment Not Started Yet

Task - Develop mentoring program (formal and informal)
Target: Enable mentoring opportunities for all employees...tie to Performance Management (part of "growth"); formalize "shadow programs" and "walk a mile" programs
Assessment Status: Assessment Not Started Yet

New employee orientation - Implement systematic "onboarding" programs to help new employees optimize performance by forming relationships and accessing central information from the start.
Objective Status: Active
Assessment Year(s): 2018 2019
Start Date: 05/22/2018
End Date: 01/31/2019

Task - Survey participants at completion; then assess data quarterly
Target: Identify topics and presenters; then apply monthly; Feedback from new employees on program effectiveness
Assessment Status: Assessment Started but not Completed

Task - Report on employee experience and knowledge gained (testing effectiveness)
Target: Improving effectiveness of knowledge gained (about SOU, their work group, University mission, values, strategic planning etc.)
Notes: Pilot the program January 2019
Assessment Status: Assessment Not Started Yet

Internal Communications - Improve internal communications and transparency by providing internal stakeholders sufficient information to enable their active participation in ongoing SOU operations.
Objective Status: Active
Assessment Year(s): 2018 2019

Objectives	Means of Assessment	Results	Actions Taken

Start Date: 05/14/2018
End Date: 08/10/2018

Performance Management - Revise existing Performance Management review program, including policies, process, and forms for administrative and classified staff. Ensure training program for managers **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 08/01/2018 **End Date:** 12/31/2019	**Task -** Establish high-level policy, process and forms (Administrators and Classified Staff only) **Target:** Drive employee engagement and active goal setting and development with frequent dialogue as opposed to a year in review. **Notes:** Build a new on-going process for relationships, goal setting, coaching, evaluation and feedback. **Assessment Status:** Assessment Not Started Yet		
	Task - Develop training and incorporate (connect) the holistic value of assessing PM reviews in accordance with the SOU vision, mission and Strategic Plan **Target:** This enables Pres / VP / Directors and managers to hold each other accountable for having 'candid conversations' (PM reviews - 2 parts: performance and growth (professional development) **Assessment Status:** Assessment Not Started Yet		

Strategic Plan Priority Goal (AY 2018-19) - 2.4 - SOU will design and implement a program that will develop a culture of service excellence in all employees.

Objectives	Means of Assessment	Results	Actions Taken
Form Service Excellence Work Group - Form Service Excellence Work Group, identify charter and way-ahead **Objective Status:** Active **Assessment Year(s):** 2017 2018 **Start Date:** 04/18/2018 **End Date:** 05/01/2018	**Task -** Cabinet approve WG's framework **Target:** Obtain feedback, get approval of framework, methodology and tools **Assessment Status:** Assessment Completed	**Reporting Period:** 2018 2019 **Result Type:** Target Met Framework approved (08/06/2018)	
Develop Service Excellence Framework - Study relative benchmarks, discuss pros/cons and coordinate framework for approval/implementation **Objective Status:** Active **Assessment Year(s):** 2017 2018 **Start Date:** 05/01/2018 **End Date:** 05/24/2018	**Task -** Present Framework to Executive Council and Cabinet, receive feedback and amend as required for implementation **Target:** Verbal review and Approval **Notes:** briefed on 14 May **Assessment Status:** Assessment Completed **Related Documents:** Service Excellence.pptx	**Reporting Period:** 2017 2018 **Result Type:** Target Met J. King suggested referring to empowerment; Scott recommended considering how/when use of "customer" is presented (05/24/2018)	**Action Taken:** Met with Jeanne S and Cynthia Scherr to discuss S.E. framework, implementation, and validate values in the model. (05/24/2018)
Teach model and set expectations with SLT - Present updated framework and teaching 'vignettes' to cabinet **Objective Status:** Active **Assessment Year(s):** 2017 2018 **Start Date:** 05/24/2018 **End Date:** 06/04/2018	**Task -** obtain approval of teaching methodology from Cabinet; and validate future timeline **Target:** Approval granted on 2 June **Assessment Status:** Assessment Completed	**Reporting Period:** 2018 2019 **Result Type:** Target Met Cabinet approved (07/09/2018)	
Teach all Directors - Teach framework, methodology and provide expectations to all Directors **Objective Status:** Active **Assessment Year(s):** 2017 2018, 2018 2019 **Start Date:** 06/05/2018 **End Date:** 06/29/2018	**Training/Professional Development -** Training classes conducted **Target:** 100% for all Directors **Notes:** BAC is 100%, Academic Affairs is 100% **Assessment Status:** Assessment Started but not Completed		

Directors teach their managers -

Generated by Nuventive Improve
13 of 35

Objectives	Means of Assessment	Results	Actions Taken
Directors teach their managers; set expectations for cascading framework and modeling behavior **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 07/02/2018 **End Date:** 07/31/2018			
Managers teach their employees - Managers introduce framework to employees (6 20-minute lessons...one per week) **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 07/16/2018 **End Date:** 08/31/2018			
Integrate KPIs into service excellence model - Integrate Key Performance Indicators into Service Excellence model; assess data monthly; monitor results **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 08/01/2018 **End Date:** 10/31/2018	**Task -** Conduct Customer Satisfaction Surveys **Target:** 98% customer satisfaction = world class **Assessment Status:** Assessment Started but not Completed **Task -** Service Recovery - measure volume **Target:** Identify the number, type and resolution of negative customer interface (aka Service Recovery) **Assessment Status:** Assessment Not Started Yet **Task -** Financial Year-end close out - variance assessment and clean audit **Target:** minimize variance to less than 10% variance to budget; obtain clean external audit **Assessment Status:** Assessment Not Started Yet		
Present initial results to Board - Provide holistic review of framework and initial results to Board **Objective Status:** Active			

Objectives	Means of Assessment	Results	Actions Taken

Assessment Year(s): 2018 2019
Start Date: 11/01/2018
End Date: 11/21/2018

Conduct lessons learned review -
Conduct review of lessons learned
(surveys, interviews and observable
data)
Objective Status: Active
Assessment Year(s): 2018 2019
Start Date: 11/01/2018
End Date: 12/31/2018

Training and mentoring - Provide all
new employees training and
mentoring in areas specific to their
work
Objective Status: Active
Assessment Year(s): 2017 2018, 2018
2019
Start Date: 07/02/2018
End Date: 11/30/2018

Task - Provide position specific
training
Target: For example, CBA awareness
training, dept chair training,
resource training and Program
Assistant training (standardize best
practice)
Notes: Need to ensure employees
receive recurring training on policy /
standards (tool for administering
training and record completion of
training)
Assessment Status: Assessment Not
Started Yet

Task - Provide access to computer
based / in-person development and
training
Target: Get programs like
"Lynda.com/LinkedIn Learning"
online; includes micro-sessions;
Partner with outreach and
engagement to offer in-person
Assessment Status: Assessment Not
Started Yet

Task - Develop mentoring program
(formal and informal)
Target: Enable mentoring
opportunities for all employees...tie
to Performance Management (part

	of "growth"); formalize "shadow programs" and "walk a mile" programs **Assessment Status:** Assessment Not Started Yet		
New employee orientation - Implement systematic "onboarding" programs to help new employees optimize performance by forming relationships and accessing central information from the start. **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 05/22/2018 **End Date:** 01/31/2019	**Task -** Survey participants at completion; then assess data quarterly **Target:** Identify topics and presenters; then apply monthly; Feedback from new employees on program effectiveness **Assessment Status:** Assessment Started but not Completed		
	Task - Report on employee experience and knowledge gained (testing effectiveness) **Target:** Improving effectiveness of knowledge gained (about SOU, their work group, University mission, values, strategic planning etc.) **Notes:** Pilot the program January 2019 **Assessment Status:** Assessment Not Started Yet		
Create strategic Communications plan - Create a strategic communications plan to guide our efforts; create uniform standards and facilitate effective communications to establish a baseline of perspectives regarding SOU **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 07/16/2018 **End Date:** 09/28/2018			
Internal Communications - Improve internal communications and transparency by providing internal			

stakeholders sufficient information to enable their active participation in ongoing SOU operations.
Objective Status: Active
Assessment Year(s): 2018 2019
Start Date: 05/14/2018
End Date: 08/10/2018

Performance Management - Revise existing Performance Management review program, including policies, process, and forms for administrative and classified staff. Ensure training program for managers **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 08/01/2018 **End Date:** 12/31/2019	**Task -** Establish high-level policy, process and forms (Administrators and Classified Staff only) **Target:** Drive employee engagement and active goal setting and development with frequent dialogue as opposed to a year in review. **Notes:** Build a new on-going process for relationships, goal setting, coaching, evaluation and feedback. **Assessment Status:** Assessment Not Started Yet		
	Task - Develop training and incorporate (connect) the holistic value of assessing PM reviews in accordance with the SOU vision, mission and Strategic Plan **Target:** This enables Pres / VP / Directors and managers to hold each other accountable for having 'candid conversations' (PM reviews - 2 parts: performance and growth (professional development) **Assessment Status:** Assessment Not Started Yet		

SOU will actively model an environmentally sustainable campus and engage in collaborative research to promote an ecologically-resilient bioregion.

Each of the three goals for this strategic direction contribute to either creating or reinforcing the overall campus commitment to sustainability: (1) SOU will be a model sustainable institution of higher education, integrating sustainable planning, practices, policies, and education throughout the university; (2) SOU will strengthen its organizational and financial infrastructure to support the advancement, promotion and reach of environmental sustainability at SOU; (3) SOU will integrate sustainability, the environment, and conservation into its curriculum, scholarship, and creative activity.

In support of Goal One, SOU has embarked on two highly innovative initiatives. First, in October 2018, SOU became the first university in Oregon to sign the Real Food Challenge, underscoring the university's intention to support ecologically sustainable, humane, and socially equitable food systems. SOU pledges that at least 20% of all food and beverage procurement will be "real food." The second initiative was developed and led by students. The Associated Students of SOU (ASSOU) entered into an agreement with the university for ASSOU to use the student Green Fund to purchase and install solar panels on the Hannon Library. The university will then pay ASSOU for electricity the system generates. This solar financing model has gained national attention from Association for the Advancement of Sustainability in Higher Education (AASHE), the primary coordinating and rating organization for sustainability in higher education. AASHE has also developed a webinar for national distribution on this model.

In addition to new initiatives, progress on ongoing activities that support this strategic direction continues. The aforementioned solar system will be the third installation completed this academic year, contributing to a 57% increase in anticipated solar energy generation. SOU is actively installing building-level electric meters to provide detailed usage data to enable analytics and decision-making. SOU's Sustainability Council, which includes students, faculty, and staff, continues to provide oversight and leadership for sustainability activities. The Council is creating a "Values Lens" to serve as a decision-making framework to better integrate sustainability, equity, diversity and inclusion in campus programs and policies. The Council is also updating SOU's Green Purchasing Policy to reflect best practices in sustainable procurement. The goal is to have both items available for campus feedback this spring.

Incremental progress is being made related to Goal Two. SOU is exploring options to elevate sustainability leadership on campus, specifically, the implementation of a Chief Sustainability Officer position. In addition, the Sustainability Coordinator expanded her student employees from two PEAK students to four, including a Zero-Waste Coordinator, a Sustainability Coordinator Assistant, and two new positions: Sustainability Data Analyst and Sustainability, Equity, Diversity and Inclusion (SEDI) Coordinator. The data analyst assists with sustainability reporting requirements and the SEDI Coordinator examines ways to recognize the intersections between sustainability and EDI and collaborate to provide programming supporting both core values.

Goal Three focuses on the integration of sustainability in curriculum and scholarly activity. The Sustainability Council will collaborate with others working on Strategic Direction I to discuss current and future opportunities to integrate sustainability into the curriculum. The Sustainability Coordinator also led SOU's first Climate Resilience Assessment, detailing how climate change will affect the university. This was the first step toward updating SOU's Climate Action Plan. In 2019, the Sustainability Council will collaborate with the City of Ashland and the Ashland School District to explore opportunities to adopt joint climate action goals and update the plan to help SOU reduce greenhouse gas emissions.

Strategic Plan Progress Report - Detail

Southern OREGON UNIVERSITY

Strategic Direction 3 - Become an Employer of Choice that Provides Excellent Service

Assessment Coordinator: Greg Perkinson - Strategic Direction 3 Sponsor
Next Program Review: 2018 2019
Program Notes: SOU will actively model an environmentally sustainable campus and engage in collaborative research to promote an ecologically-resilient bioregion.

There are no priority goals in this strategic direction.

SOU will create a diverse, equitable, inclusive community where learners flourish.

Goal Two <mark>[priority]</mark>: SOU will establish supportive pathways that will increase the access, retention, and success of learners (students, faculty, and staff) from underrepresented backgrounds.

The first steps in addressing this priority goal include analysis of needs and approaches to providing supportive pathways for students, faculty and staff across the three areas of access, retention and success. Included in this will be a census of faculty, staff and students from "underrepresented" communities (e.g. non-majority ethnic, racial and cultural groups; gender non-conforming and LGBTQ; veterans; first-generation; low socio-economic status), and analysis to determine where needs are greatest. Existing programs, services, activities and resources will also be inventoried. Included in this analysis will be findings generated by the newly convened Professional Learning Community (PLC) focusing on learner satisfaction and success. Once needs and existing resources have been analyzed, the work to implement, continue or revise existing programs will commence, both to enhance existing activities, as well as develop new ones. Several campus entities will contribute to this work, including but not limited to, the Diversity, Access and Inclusion Oversight Committee, the Title IX team, the X-Factor faculty group, staff and students involved in the various identity resource centers on campus (including the Queer Resource Center, Multi-cultural Resource Center, Women's Resource Center, and Veterans' Resource Center), as well as faculty and students from key academic programs, such as Gender, Sexuality and Women's Studies, Native American Studies and others.

Work to restructure, staff, and provide resources in support of this strategic direction was largely focused in Fall 2018 on establishing the new Office of Diversity, Equity, and Inclusion, developing the charge and position description for the new Chief Diversity and Inclusion Officer/Title IX Coordinator, and conducting a national search. SOU will also apply for an AmeriCorps Diversity Volunteer position in March 2019. In Fall 2019, the newly created position of Equity Grievance Director was appointed. Reporting to the Chief Diversity and Inclusion Officer, the EGB will oversee discrimination and bias concerns and promote a diverse campus culture. The new Veterans' Resource Coordinator will start in January 2019. In addition to retention efforts for veterans and military-connected students, one-quarter of the position is dedicated to recruitment and outreach. SOU will also be hosting Dr. Chad Hamill as an ACE Fellow in 2019. He is currently the Vice President for Native American Initiatives at Northern Arizona University and will focus on Native American student recruitment and enrollment strategies.

Human Resource services has integrated equity into its new employee on-boarding program which includes training on equity grievance process and the university's commitment to establishing safe and responsible workplace free from gender or other forms of discrimination. SOU has also recently joined the Higher Education Recruiting Consortium in order to ensure that recruiting and hiring practices are consistent with goals of inclusion, access and equity, and Human Resource services continues to train and provide "diversity advocates" for search committees. Student Life provides ongoing mentoring, advocacy, and collaborative support and programming to several key communities, including the upcoming Black Youth Leadership Summit and the "Audacity" Queer Leadership program focusing on the intersections between leadership and queer identities.

SOU complies with federal requirements for diversity and inclusion such as Clery Act reporting, Affirmative Action and Equal Opportunity practices and reporting, and Title IX compliance, all of which are designed to ensure that the institution protects and safeguards the rights and opportunities of all its members. Over the Fall 2018 term, the acting Chief Diversity and Inclusion Officer identified a process and convened a committee to address newly legislated Oregon Revised Statute 350.375 which requires all public universities and community colleges to meet cultural competency requirements.

Strategic Plan Progress Report - Detail

Southern OREGON UNIVERSITY

Strategic Direction 4 - Create a Diverse, Equitable, & Inclusive Community Where Learners will Flourish

Assessment Coordinator: Shenethia Manuel - Strategic Direction 4 Sponsor
Next Program Review: 2018 2019
Program Notes: SOU will create a diverse, equitable, inclusive community where learners flourish.

Strategic Plan Priority Goal (AY 2018-19) - 4.2 - SOU will establish supportive pathways that will increase the access, retention, and success of learners (students, faculty, and staff) from underrepresented backgrounds.

Objectives	Means of Assessment	Results	Actions Taken
Institutional Climate and Inter-group Relations-cultural competency process - Implement the process and form the committee required in ORS 350.375 which outlines the states mandate for cultural competency requirements at public universities and community colleges **Objective Status:** Active **Assessment Year(s):** 2018 2019	**Task -** The process will be finalized and the committee will be formally appointed by the President of the University **Target:** The target date for completion is on or before December 31, 2019, as required by the statute. **Assessment Status:** Assessment Started but not Completed		
Inventory of Supportive Pathways - Provide inventory of activities, programs, initiatives focused on access, retention and success (faculty, staff, learners) **Objective Status:** Active **Assessment Year(s):** 2018 2019	**Task -** Inventory existing programs and initiatives focused on success **Target:** Inventory completed **Assessment Status:** Assessment Not Started Yet		
	Task - Inventory existing programs and initiatives focused on retention **Target:** Inventory completed **Assessment Status:** Assessment Not Started Yet		
	Task - Inventory existing programs		

Objectives	Means of Assessment	Results	Actions Taken
	and initiatives focused on access **Target:** Inventory completed **Assessment Status:** Assessment Not Started Yet		
Analyze Supportive Pathway - Analyze need and approaches for supportive pathways to increase access, retention and success **Objective Status:** Active **Assessment Year(s):** 2018 2019	**Task -** Conduct census that quantifies representation in underrepresented communities at SOU **Target:** Determine populations that are underrepresented **Notes:** Establish which communities (e.g. ethnic/race, gender and sexual identity, first-generation, veterans. low SES, rural, etc.) are underrepresented and most in need of supportive pathways **Assessment Status:** Assessment Not Started Yet		
	Process Analysis - PLC on learner satisfaction and success specific to underrepresented communities **Target:** Convene PLC research, analyze and compile findings **Assessment Status:** Assessment Not Started Yet		
	Task - Needs assessment **Target:** Assessment of needs in relation to access, recruitment and success relative to underrepresented communities **Assessment Status:** Assessment Not Started Yet		
Establish Supportive Pathways - Development and implementation of programs, activities, initiatives to increase access, retention and success **Objective Status:** Active **Assessment Year(s):** 2018 2019	**Task -** Implement, continue, and/or revise programs, activities, initiatives to increase access **Target:** Pathways established **Assessment Status:** Assessment Not Started Yet **Task -** Implement, continue, and/or		

Objectives	Means of Assessment	Results	Actions Taken
	revise programs, activities, initiatives to increase retention **Target:** Pathways established **Assessment Status:** Assessment Not Started Yet		
	Task - Implement, continue, and/or revise programs, activities, initiatives to increase success **Target:** Pathways established **Assessment Status:** Assessment Not Started Yet		

SOU will maintain financial stability and invest for institutional vitality.

Goal One [priority]: SOU will develop, implement and monitor a comprehensive strategic enrollment management plan.

In support of Goal One, the Enrollment Management Council (EMC) was established in February 2018, comprising 23 key individuals and was co-chaired by the Provost and the Acting VP for Enrollment Management and Student Affairs. Its work was developed through six standing committees focusing on how SOU can better attract and retain students. The EMC developed planning assumptions and reviewed SOU's enrollment history, retention rates, marketing and recruitment plans in order to better understand the context, details and opportunities for enrollment.

The initial outcome of the EMC's work was the development of a three-year Enrollment Management Plan that identified a) specific goals for both recruitment and retention of students during the planning period and beyond; b) thirty-five initiatives to enhance the recruitment and retention of students with each initiative identifying the desired outcomes, accountability, start, and completion dates; c) an on-going structure through which the EMC would monitor progress, assess changing conditions, and initiate and/or modify plans accordingly.

At the completion of fall term, several aspects of this strategic direction had been undertaken or initiated, including: development of an Admissions Operations Plan, convening of an Orientation Council, undertaking of the Public Perception Survey, development of a Student Satisfaction Assessment, and review of institutional Financial Aid to better incentivize new and continuing enrollment.

SOU recently entered into an agreement with the Education Advisory Board (EAB) to implement the Student Success Collaborative system. This platform will significantly enhance our ability to effectively engage students and create efficiencies in advising by identifying risk factors and barriers to success. Importantly, it provides a sophisticated methodology for more effective intervention for academically "at-risk" students. Other institutions in the Student Success Collaborative report significant gains in persistence and degree completion. We will complete full implementation by Fall 2019.

Work on Goal Two focuses on creating key performance indicators (KPI) and using them to improve decision-making and enable operational success. The AVP for Budget and Planning initially led this work, forming a working group to explore how to leverage the Kaplan Scorecard methodology in the execution of the strategic plan. Accordingly, a matrix was developed to identify how "legacy" KPIs fit some of our criteria, and to also highlight areas where further development was needed. Directors in Business Affairs Council have started the development of "headline" metrics, three to five indicators that are customer-focused and measure priorities. Initial KPIs will be developed in the first quarter of calendar year 2019. Workshops and professional development opportunities related to KPI metrics were provided to staff members.

Over the next six months, additional workshops for key campus leaders will be conducted, including the new VP for Enrollment Management and Student Affairs. This effort directly supports the Institutional Effectiveness (IE) initiative launched in fiscal year 2018. KPIs that are developed will inform the ongoing goals of achieving continuous improvement and will also support the goals related to service excellence in Strategic Direction II.

Strategic Plan Progress Report - Detail

Strategic Direction 5 - Maintain Financial Stability and Invest for Institutional Vitality

Assessment Coordinator: Greg Perkinson - Strategic Direction 5 Sponsor
Next Program Review: 2018 2019
Program Notes: SOU will maintain financial stability and invest for institutional vitality.

<mark>Strategic Plan Priority Goal</mark> (AY 2018-19) - 5.1 - SOU will develop, implement and monitor a comprehensive strategic enrollment management plan.

Objectives	Means of Assessment	Results	Actions Taken
Convene Enrollment Mgmt Council - The enrollment management council will be reconvened with regular meeting schedules established. **Objective Status:** Active **Assessment Year(s):** 2017 2018, 2018 2019	**Task -** Council will be constituted by co-directors of EMC with schedules advertised. **Target:** Council established in AY 2017-18 **Assessment Status:** Assessment Completed	**Reporting Period:** 2018 2019 **Result Type:** Target Met Council convened (01/07/2019)	
	Task - Enrollment management plan drafted **Target:** Draft plan by end of AY 2017-18 **Assessment Status:** Assessment Completed **Related Documents:** [EMCPLANFINAL with appendices.docx](#)	**Reporting Period:** 2018 2019 **Result Type:** Target Met Plan adopted (01/07/2019)	

Objectives	Means of Assessment	Results	Actions Taken
Establish KPI working group - Develop a cross-functional WG to identify options, alternatives, a framework, comm-plan, etc. **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 07/02/2018 **End Date:** 08/31/2018			
Develop KPI framework - Consider options, then develop a standard methodology to develop, present and utilize KPIs **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 07/12/2018 **End Date:** 09/28/2018			
Develop linkage from KPIs to Strategic Plan; and accreditation - Ensure KPIs will support the Strat Plan, and will add value to the 7-year accreditation cycle; then integrate them into business processes **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 10/01/2018 **End Date:** 02/28/2019			
Present first phase of KPIs to Cabinet - Ensure cabinet has reviewed, understands, and supports the KPI method and operating rhythm **Objective Status:** Active **Assessment Year(s):** 2018 2019 **Start Date:** 01/01/2019 **End Date:** 03/25/2019			

SOU will develop physical and virtual environments in which all learners can thrive.

Although this strategic direction was not identified as an immediate priority, the team has made progress on its goals of improving learning spaces as well as access to learning environments. The Director of Facilities, Management and Planning has led efforts to ensure Universal Design (and active learning spaces) are integrated into future capital improvements. For example, a space with both enhanced accessibility and opportunities for learning or performing was designed and constructed adjacent to the new Jefferson Public Radio studio which opened this fall. In addition, the new Theatre facilities offer interactive lighting labs, a workshop for making costumes, and hands-on workshops for set design and construction using wood-shop and metal-shop spaces. New spaces, such as those in Theatre and JPR, are available to faculty who undertake interactive activities with groups of up to 40 students, allowing participants to move around and collaborate in ways that are restricted in traditional classrooms. Instructional spaces with such flexibility are in short supply on campus, and these spaces increase students' learning opportunities. Among other benefits, flexible, collaborative learning spaces help prepare students for the future of workplaces and to work in diverse environments.

Other examples of new, flexible learning spaces are the Thalden Pavilion and Lithia Motors Pavilion. The Thalden Pavilion creates an open-air opportunity for educational, community-building, and civic ventures. Similarly, the Lithia Motors exterior courtyard was designed and built to enable academic instruction adjacent to the facility on the lower level. Athletic and Academic departments will use this space for classroom and co-curricular activity. Future capital improvement projects such as Britt and Central Hall renovations, will apply Universal Design practices wherever possible, and will seek to enhance and increase active learning spaces.

Virtual reality technologies were included successfully in the Theatre renovation and in the next six months, SOU will continue its exploration of how to integrate immersive technologies in the classroom. Key faculty members in programs that utilize the Digital Media Center (DMC), instructors, related academic programs, and staff at the DMC will continue to pursue new technologies for selected learning environments.

Strategic Plan Progress Report - Detail

Strategic Direction 6 - Develop Physical & Virtual Environments in Which Learners Will Thrive.

Assessment Coordinator: Greg Perkinson - Strategic Direction 6 Sponsor
Next Program Review: 2018 2019
Program Notes: SOU will develop physical and virtual environments in which all learners can thrive.

There are no priority goals in this strategic direction.

SOU will be a catalyst for economic vitality, civic engagement and cultural enrichment through ongoing collaboration with local, state, national, and global partners.

Activities and initiatives related to this goal are an ongoing part of campus identity, but have been somewhat disparate. Its inclusion as a strategic direction enhances the visibility and importance of the role that SOU plays in the community and region, and the institution's many partnerships. Executive leadership has emphasized this role in recent Board and Cabinet discussions regarding "town-gown" relationships. Over the last six months, accomplishments related to the two goals identified for this strategic direction are wide-ranging.

In support of Goal One, which focuses on SOU as a resource and collaborative partner for the economic, cultural, artistic and social betterment of the region, several activities have taken place. In order to foster increased development of key partnerships, President Schott hosted City of Ashland leaders for a small-group dinner at her home to discuss collaborating more significantly. Subsequently, the mayor and city councilors participated in the SOU Homecoming Parade and increased Chamber participation in the parade next year is planned. The City of Medford has also asked SOU to provide a high-level campus member to participate in two city commissions.

Collaboration to increase access to higher education has advanced significantly through the newly created Southern Oregon Higher Education Consortium launched in November. New corporate partnerships are being developed between the university and several local and regional business as a result of the online MBA program.

SOU made gains in leveraging university resources to contribute to the cultural enrichment of the region this past year, installing the World Peace Flame at the Thalden Pavilion on the SOU campus, hosting "Guanajuato Nights" to support student exchanges and Ashland's sister city relationship, and partnering with the Oregon Shakespeare Festival, Red Earth Descendants, and other community entities for the 2018 Indigenous People's Day celebrations. We continue to develop partnerships with the K-12 system to serve under-represented groups. SOU has launched new programs with Ashland High School focusing on opportunities for Native American students, and with the Phoenix-Talent School District's work to support parents of Latinix students.

Goal Two states that "SOU will collaborate with a wide range of partners to provide civic engagement, service learning, and community-based learning experiences for all its learners. Various activities and on-campus events support this goal, including an SOU-hosted Town Hall with state senator candidates held during the 2018 election. Over 350 participants attended, including 60 SOU students. This event has sparked a student-planned "improv" event with the newly elected Senator Jeff Golden to be held early in Winter term. The SOU Creativity Conference attracted over 300 attendees from the SOU campus, surrounding community, across the US, and 28 countries.

SOU is also developing curricular initiatives that support this goal. Most academic degree programs provide practicum and internship opportunities that situate students in a wide range of local and regional community groups, businesses and governmental entities. One such program infusing community-based learning components into curriculum is Healthcare Administration (HCA). The program has developed a regional Population Health and Community Wellbeing dashboard, based on industry needs, for which students will analyze and input data sets, as well as complete practica and capstones within community organizations to work on progress toward these indicators.

Overall, there is increased energy around partnerships and a growing sense of the importance of SOU's role in the community. Over the next six months, we anticipate that several of these newly launched programs, such as the regional consortium and K-12 partnerships, will increase their presence in the community, while partnership development efforts continue to provide more avenues for collaborative successes.

Strategic Plan Progress Report - Detail

Southern OREGON UNIVERSITY

Strategic Direction 7 - Catalyst for Economic Vitality, Civic Engagement, and Cultural Enrichment with Local/State/National/Global Partners

Assessment Coordinator: Jeanne Stallman - Strategic Direction 7 Sponsor
Next Program Review: 2018 2019
Program Notes: SOU will be a catalyst for economic vitality, civic engagement and cultural enrichment through ongoing collaboration with local, state, national, and global partners.

There are no priority goals in this strategic direction.