SOUTHERN OREGON UNIVERSITY

SOU THRIVE

students thriving | team thriving | institution thriving

Integrated Strategic Plan

Mapping the Vitality Plan and the Future-Ready Enrollment Plan to the SOU Strategic Plan

WORKING DRAFT

Source documents

SOU Strategic Plan — adopted by the Board of Trustees, October 2025

The Vitality Plan: Path to Fiscal Sustainability — FINAL, July 21, 2026

Future Ready Enrollment Plan 2025–2027 — SOU Enrollment Council

Contents

Purpose and How to Use This Document

The SOU Strategic Plan adopted by the Board of Trustees in October 2025 remains the university's governing framework. It sets three priorities — Students Thriving, Team Thriving, and Institution Thriving — and eleven objectives beneath them, each with suggested key performance indicators and each fed by a set of named workflows.

Two planning efforts now carry much of the work of delivering on those objectives. The Vitality Plan, finalized July 21, 2026, is the university's path to fiscal sustainability and, at the same time, its answer to an identity question: what SOU will be as a small, place-based, regional public university. The Future Ready Enrollment Plan 2025–2027, developed by the SOU Enrollment Council, is the strategic enrollment management plan — and it is the same Future-Ready Enrollment Plan already named as a workflow in the adopted strategic plan, which means it does not need to be bolted on. It was always part of the architecture.

This document does not replace any of the three. It maps them. Each pillar and each objective from the adopted strategic plan appears here in its original form, with its original workflows and KPIs, followed by the strategies and tactics from the Vitality Plan and the Future-Ready Enrollment Plan that will actually move that objective's outcomes. Read down a pillar to see what the university committed to; read across an objective to see who is doing what about it.

How to read each objective

- Objective — the statement as adopted in October 2025, unchanged.
- Key performance indicators — the suggested KPIs from the adopted plan.
- Vitality Plan strategies and tactics — grouped by strategy, each drawn from the Vitality Plan.
- Future-Ready Enrollment Plan strategies and tactics — grouped by strategy, with the named Lead Partner for each.
- Targets — the numeric AY 2027 targets from the enrollment plan that bear on this objective, where they exist.
- Watch items and alignment notes — where a plan reduces capacity in the function an objective depends on, where two plans pull in different directions, or where one plan supplies a measure another lacks.

Section 8 collects the points where the three plans genuinely conflict, or where a decision has to be made before implementation can proceed. It is the shortest section and the one most worth reading first.

The SOU Thrive Framework

The framework below is the structure adopted by the Board in October 2025, covering 2025 to 2028. It is reproduced here without modification; everything that follows in this document hangs from it.

Priority 1: Students Thriving	Priority 2: Team Thriving	Priority 3: Institution Thriving
1a. Student Success 1b. Academic Engagement and Support 1c. Basic Needs (food, housing, belonging, mental and physical healthcare, financial stability) 1d. Personal and Professional Development	2a. Compensation 2b. Workload Distribution 2c. Morale and Campus Culture (work/life balance)	3a. Enrollment 3b. Financial Stability 3c. Effective Financial Management 3d. Collaboration With External Community Partners

Core values: Integrity · Student-Centered · Sustainability · Accountability · Transparency

How the Three Plans Fit Together

The Strategic Plan (adopted October 2025)

The governing framework. Three priorities, eleven objectives, suggested KPIs, and a set of workflows — the Future-Ready Enrollment Plan, the Investment Plan, the Resiliency Plan, the Financial Management Plan, and the Engagement Plan — through which the objectives are pursued. It was built on the principles that the plan focus on major effort areas and objectives, that everyone has a voice and agency in the process, and that it be accessible, usable, and actionable.

What it supplies: the objectives and the outcome measures. What it does not supply: owners, timelines, or numeric targets.

The Vitality Plan (FINAL, July 21, 2026)

The path to fiscal sustainability, and the university's answer to what it will be on the other side of it. Built on the Board's May 8, 2026 direction to use Deloitte's Option Path framework as a resource in constructing a roughly $20 million structural change, the plan pairs cost reduction with a redefinition of the academic model: a proposed new mission and vision, the Rogue Valley Living Laboratory as a shared pedagogical operating system, six Academic Cornerstones in place of departmental silos, a single Dean of Faculty, streamlined degree pathways, and new fiscal models for every auxiliary.

What it supplies: the cost structure, the academic model, and the institutional identity. What it does not supply: named owners for most commitments, or enrollment targets.

The Future-Ready Enrollment Plan (2025–2027)

The strategic enrollment management plan, developed by the SOU Enrollment Council. It sets institutional-level key performance indicators across student success, financial success, and enrollment — each with a 2024 baseline and three years of aspirational, optimistic, and projected values — and organizes its strategies into four domains: Student Experience, Community Engagement and Belonging, Academics, and Marketing. Every initiative carries a defined measure and a named Lead Partner.

What it supplies: numeric targets, named owners, and a reporting cadence. What it does not supply: cost structure, or program portfolio decisions.

The complementarity is the point

The adopted strategic plan names the outcomes. The Vitality Plan determines what the institution can afford and what it will be. The Future-Ready Enrollment Plan supplies the revenue assumptions the cost model depends on, and — uniquely among the three — assigns a person and a number to each commitment. Where the enrollment plan and the Vitality Plan address the same objective, they generally do so from opposite ends: the Vitality Plan changes the structure, the enrollment plan measures whether the structure worked.

Enrollment Targets and Measures

The tables below are the institutional-level key performance indicators from the Future-Ready Enrollment Plan, reproduced in full. They are the only numeric targets any of the three plans carries, and they are therefore the measures against which the integrated plan should be reported. Aspirational, optimistic, and projected values are shown side by side deliberately — the gap between them is a planning fact, not a rounding error.

Student Success

Metric	2024 Baseline	AY 2025 (Year 1)	AY 2026 (Year 2)	AY 2027 (Year 3)
FAFSA Submission Rate	Actual: 78%	Projected: 78% Actual: 81.6% (current)	Aspirational: 82% Optimistic: 81% Projected: 80%	Aspirational: 83% Optimistic: 82% Projected: 81%
FTFT UG Retention Rate	Actual: 68.2%	Projected: 68% Actual: 68.9%	Aspirational: 71% (362/510) Optimistic: 69.6% (355/510) Projected: 70%	Aspirational: 72.1% Optimistic: 70.7% Projected: 71%
Second-year UG Retention Rate	Actual: 78.1%	Projected: 78% Actual: 79.5%	Aspirational: 83% Optimistic: 81% Projected: 80%	Aspirational: 82.4% Optimistic: 80.8% Projected: 81%
Overall UG Retention Rate	Actual: 79%	Projected: 79% Actual: 79.9%	Aspirational: 83% Optimistic: 81% Projected: 81%	Aspirational: 83.4% Optimistic: 81.8% Projected: 82%
6-year FTFT Graduation Rate	Actual: 41.2%	Projected: 42% Actual: 42.1%	Aspirational: 43.4% Optimistic: 42.5% Projected: 43%	Aspirational: 44.3% Optimistic: 43.4% Projected: 43%
Overall GR Retention Rate	Actual: 82.4%	Projected: 82% Actual: 85.4%	Projected: 82%	Projected: 84%

Financial Success

Metric	2024 Baseline	AY 2025 (Year 1)	AY 2026 (Year 2)	AY 2027 (Year 3)
Institutional UG Discount Rate (unfunded remission / gross revenue)	Actual: 15.73%	Projected: 15%	Projected: 14%	Projected: 13%
Gross Tuition Revenue (UG & GR)	Actual: $33,648,919	Projected: $32,934,919	Projected: $31,981,774	$31,447,902

Enrollment (all metrics exclude OLLI/ASC; data pulled on census)

Metric	2024 Baseline	AY 2025 (Year 1)	AY 2026 (Year 2)	AY 2027 (Year 3)
New UG Headcount	810	Projected: 774 Actual: 786	Aspirational: 810 Optimistic: 794 Projected: 786	Aspirational: 810 Optimistic: 794 Projected: 790

Metric	2024 Baseline	AY 2025 (Year 1)	AY 2026 (Year 2)	AY 2027 (Year 3)
UG Fall FTE	2,371	Projected: 2,288 Actual: 2,214	Aspirational: 2,280.4 Optimistic: 2,236.1 Projected: 2,214	Aspirational: 2,280.4 Optimistic: 2,236.1 Projected: 2,225
GR Fall FTE	273	Projected: 262 Actual: 283	Aspirational: 291.5 Optimistic: 285.8 Projected: 283	Aspirational: 291.5 Optimistic: 285.8 Projected: 285
Core Revenue SCH	118,218	Aspirational: 121,765 Optimistic: 119,400 Projected: 111,227 Actual: TBD	Aspirational: 114,564 Optimistic: 112,339 Projected: 106,969 Actual: TBD	Aspirational: 110,718 Optimistic: 108,034 Projected: 102,521 Actual: TBD
% Returners to Residence Halls (Shasta & McLoughlin only, fall to fall)	39.2%	Projected: 38% Actual: 36.9%	Projected: 39%	—
UG Percent Change in Yield	29.83%	Projected: 30.19% Actual: 31.11%	Aspirational: 32.04% Optimistic: 31.42% Projected: 31.11%	Aspirational: 32.04% Optimistic: 31.42% Projected: 31.11%

Notes on the measures

- Aspirational targets are set at +3% and optimistic targets at +1% from prior actuals or projections.
- All numbers reflect a point in time of 10/19/2025 and are updated annually as actuals become available.
- Gross tuition revenue figures are sourced from the enrollment projections on the pro forma as of 8/26/2025 — before the Vitality Plan restructure.
- Core Revenue SCH comprises WUE, UG resident, Jackco Pledge, UG non-resident, GR resident, GR non-resident, RisePoint MBA, RisePoint MS.Ed, and MEDU; it excludes staff, waivers, course-based, ASC, and Early Entry SCH.
- State support per FTE may not read intuitively: as FTE decreases through enrollment losses, the percentage share of state support increases.
- Context: SOU experienced a 14% decline in first-time, full-time enrollment between 2010 and 2023. Oregon demographic projections indicate an additional 8% decline in the traditional college-age population between 2023 and 2035. Other Oregon universities are increasing their share of the available student market. (Source: EAB analysis of IPEDS fall enrollment data; WICHE Knocking at the College Door projections.)

Priority 1: Students Thriving

Priority 1 holds SOU accountable for the experience and outcomes of the students it enrolls. The Vitality Plan advances this priority chiefly through the Rogue Valley Living Laboratory pedagogical model, the Academic Cornerstones, and a deliberate simplification of the paths students take to a degree. The Future-Ready Enrollment Plan advances it through the day-to-day mechanics of onboarding, advising, early intervention, and belonging — and it is the only one of the three plans that assigns a named owner and a reportable measure to each commitment. Where a plan reduces capacity in a support area, that reduction is noted so it can be monitored against the KPIs below.

Workflows for this priority

- Future-Ready Enrollment Plan
- Investment Plan (Recruitment & Student Success)

Objective 1a. Student Success

Maximizing the number of students who achieve their educational goals.

Key performance indicators (as adopted)

- First-year retention rate
- 4-year and 6-year graduation rates
- Number of degrees and certificates awarded per year
- A KPI for non-degree-seeking students (to be defined)

Vitality Plan strategies and tactics

Streamline every path to a degree

- Prioritize Degree-in-3, 3+1, and 4+1 models and stackable credentials in every discipline.
- Produce a clear degree pathway document for every major.
- Establish clear transfer articulation pathways for every major.
- Adapt the General Education model to the statewide pattern (30–36 lower-division credits, with the option of up to 15 upper-division credits) to ease pathway navigation and transfer.

Redesign advising for consistency and coverage

- Move Student Success Coordinators to a centralized location rather than assignment to specific schools or colleges.
- Cross-train the advising team so caseloads are equitably distributed and students are not left without support as the footprint shrinks.
- Continue to serve primary academic programs through the centralized model.

Make retention an explicit institutional priority

- Design activities that raise first-year and overall retention, which the Vitality Plan identifies as still well below where they need to be.

- Address both the socialization dimension (connectedness to other students and the broader community) and the financial dimension (scholarship options such as housing and dining assistance and other non-tuition needs).

Use calendar and delivery flexibility to remove completion barriers

- Move content that is suitable for asynchronous delivery online so limited in-person resources concentrate on high-impact, applied, and community-based learning.
- Explore a university-wide change to the academic calendar, including 10-week terms with extended breaks and five-week block scheduling, with a cost-benefit analysis before adoption.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan carries the operational weight of this objective. Its Student Experience domain is, in effect, the retention program.

Start students well

- Implement a streamlined onboarding experience for new and transfer undergraduate students. Measures: percentage of students reporting they feel welcomed and supported during onboarding; fewer than 14 days between eligibility to register and actual registration. (Lead: Director of Advising & Orientation)
- Expand new student programming focused on fostering connection within the first six weeks of the term, on the expectation that participants retain and report satisfaction at higher rates than non-participants. (Lead: Director of Belonging & Engagement)

Intervene early and by name

- Implement early intervention for students with balance holds, measured by the length of time between a hold being applied and removed. (Lead: Bursar)
- Implement progress reports for at-risk sophomores with targeted outreach: 80% of flagged students contacted within three days of alert; 30% of those contacted moving in a positive academic direction; 30% moving from unpayable to payable. (Lead: Director of Advising & Orientation)
- Implement progress reports for graduate students, tracking the percentage of flagged students receiving timely follow-up, disaggregated by demographics, and advisor-relationship satisfaction. (Lead: Provost's Office)

Build credit momentum toward completion

- Provide proactive advising to map and monitor four-year completion. Measures: percentage of first-year students completing 45 credits in year one; percentage enrolled in 15 or more credits each term; percentage graduating within one year of reaching 150 credits. (Lead: Director of Advising & Orientation)
- Reduce DFWI rates in gateway courses through supplemental instruction and tutoring, prioritizing high-DFWI courses and redesigning high-failure courses with peer supplemental instruction or co-requisite support. (Lead: Tutoring)

Bring stopped-out students back

- Administer a rolling “Return to SOU” communication plan for stop-out students with 90 or more credits, measured by re-enrollment rate disaggregated by demographics. (Lead: AVP of Enrollment Services)

> **Targets**
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> Targets carried by this objective: first-time full-time undergraduate retention from a 68.2% baseline to a projected 71% by AY 2027 (aspirational 72.1%); overall undergraduate retention from 79% to a projected 82% (aspirational 83.4%);

six-year graduation rate from 41.2% to a projected 43% (aspirational 44.3%); overall graduate retention from 82.4% to a projected 84%.

Watch item: the reduction and centralization of Student Success Coordinators is a capacity reduction in the function most directly tied to retention — and the Director of Advising & Orientation is the named lead on four separate Future-Ready Enrollment Plan initiatives. Confirm the capacity to deliver both before committing to the AY 2027 retention targets.

Objective 1b. Academic Engagement and Support

Create an educational environment where SOU students "are fully immersed in their learning" through high-impact practices.

Key performance indicators (as adopted)

- First-year retention rate as a measure of first-year experience effectiveness (or first-year average GPA)
- Percentage of students completing academic advising appointments
- Number of learning communities available
- Number of students involved in faculty research and projects
- Student feedback (SSI, campus climate, and similar instruments)

Vitality Plan strategies and tactics

Adopt the Rogue Valley Living Laboratory as the shared operating model

- Place is the syllabus: every program teaches with and through the Rogue Valley — its bioregion, Indigenous histories, arts ecosystem, rural economy, and wilderness as course content rather than field-trip backdrop.
- Mentorship is structural: every student has at least one known mentor for every year of their program, with mentorship counted, supported, and protected in faculty workload.
- Work produces work: every student graduates with a portfolio of public-facing outputs.
- Time follows learning: academic calendars mix full terms, intensive immersive blocks, and intensive terms for internships and fieldwork.
- Structural silos are eliminated: programs collaborate around shared curriculum, and general education is reimagined as portfolio-based interdisciplinary work along broad pathways.
- Human-equipping and technology: curriculum prioritizes judgement, creativity, empathy, ethical reasoning, and interpersonal capacity alongside the ability to engage with, adapt to, and design emerging technologies.
- Test every program against all six principles; a program satisfying fewer than four is not yet a Living Laboratory program.

Organize the portfolio around six Academic Cornerstones

- Anchor programs to Bio-Regional, Health, Creative Arts & Industries, Civic Engagement, Applied Sciences, and Professional Studies as cross-disciplinary lenses rather than administrative directives.
- Allow shared curriculum to cross cornerstones; cornerstones are not limited to the programs housed within them.

Embed connected learning in every program of study

- Require experiential learning early in the program, focused on an introductory course in the Academic Cornerstone.
- Require an interdisciplinary capstone at the end of the program.
- Build 24–32 credits of lower- and upper-division interdisciplinary shared coursework (6–8 shared courses) covering introductory concepts, data literacy, moral and ethical reasoning, cross-cultural collaboration, human and technology interactions, methods and inquiry, practicum/applied learning, and a university integrative capstone.
- Shift face-to-face class time from lecture to studio: debate, troubleshooting, creating, and coaching from faculty.

Flatten academic administration so decisions sit closer to students

- Replace the multiple-dean model with a single Dean of Faculty reporting to the Provost and working directly with department chairs.
- Give department chairs direct input into academic decision-making and programmatic adjustments.
- Hold quarterly chairs training sessions.

Manage class size holistically rather than mechanically

- Target minimum class sizes of 40 in lower-division lecture and hybrid courses and 20 in upper-division courses, as general principles.
- Evaluate program targets holistically, allowing smaller or larger sections, with exceptions where licensure requirements apply.
- Emphasize shared curricular efficiencies across programs to reduce low-enrolled course rotations.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan's Academics domain addresses the same objective from the instructional-quality side, and supplies measures the adopted plan leaves open.

Close gaps in gateway and high-failure courses

- Flag courses with DFWI rates above 20% for targeted intervention, and track the change in DFWI rate over time for those courses. (Lead: Director of Advising & Orientation)
- Conduct equity audits of curriculum so content, modalities, and supports reflect diverse learners and lived experiences. Measures: DFWI rates in gateway courses disaggregated by identity; persistence gaps by race/ethnicity, gender, and income status. (Lead: Institutional Research)

Invest in teaching capacity

- Deliver faculty development in inclusive teaching and Universal Design, with a focus on neurodiverse learners and students with disabilities. Measures: percentage of programs completing the training; reduction in the pass-rate gap between students with and without registered disabilities in high-enrollment courses; change in DFWI rates for programs that have completed training versus those that have not. (Lead: Director of Instructional Support; CATL)

Make faculty relationships a designed experience, not a byproduct

- Strengthen student-faculty and staff relationships through structured mechanisms such as office-hour scavenger hunts and faculty-student meetups. Measures: percentage of first-year students reporting a one-on-one meeting with a faculty or staff member outside class; qualitative feedback from end-of-term course and advising evaluations. (Lead: Dean)

Alignment note: the Future-Ready Enrollment Plan's structured faculty-relationship initiatives and the Vitality Plan's "mentorship is structural" principle are the same commitment approached from two directions. The enrollment plan supplies the measure the Vitality Plan lacks; the Vitality Plan supplies the workload protection the enrollment plan assumes.

Objective 1c. Basic Needs

Food, housing, belonging, mental and physical healthcare, and financial stability — ensure that all SOU students have access to "the resources they need throughout their academic journey to focus, succeed and complete their degree."

Key performance indicators (as adopted)

- Number of students served through SOU basic needs programs (monthly touchpoints at the Student Food Pantry, student-donated meal points, Cares notes, visits to the Benefits Navigator, and external referrals)
- Number of students served by La Clinica/Telus for physical and mental health needs, and their satisfaction
- Percentage of students indicating a sense of belonging (SSI survey / campus climate survey)
- Number of students with SBH, financial literacy program participants, and other financial aid measures

Vitality Plan strategies and tactics

Expand health and behavioral health access through the La Clinica partnership

- Pursue an expanded La Clinica footprint on campus, which would extend services to faculty and staff and potentially local community members while generating a revenue stream.
- Act on La Clinica's expressed interest in an enhanced partnership as soon as practical.
- Build behavioral health capacity through the retained Clinical Mental Health Counseling program and the Human Service / PSY-SOAN collaboration on licensed behavioral health and wellness practitioner preparation.

Address affordability and stability as retention levers

- Explore scholarship opportunities aimed at housing and dining assistance and other non-tuition student needs.
- Close the gap between dining pricing and the cost of service, and fill unused housing capacity, while monitoring the student cost impact.

Sustain food access and community connection through the Farm at SOU

- Maintain the flow of farm-grown produce to the SOU campus community as the Farm transitions to a self-support model with regional non-profit and for-profit partners.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan approaches basic needs primarily through financial stability and belonging, and it supplies the belonging measure the adopted plan calls for.

Remove financial barriers before they become stop-outs

- Implement early intervention for students with balance holds, tracking the time between a hold being applied and removed. (Lead: Bursar)
- Implement targeted outreach so that second-year FAFSA renewal exceeds 90%. (Lead: Director of Financial Aid)
- Conduct targeted FAFSA and scholarship outreach for incoming students. Measures: FAFSA completion rate; SOSA submission rate; percentage of students receiving aid. (Lead: Director of Financial Aid)

Align aid with need and with enrollment priorities

- Stabilize the remissions model and conduct a comprehensive audit of the current model, aligning remission with strategic enrollment priorities including first-generation, high-achieving, transfer, graduate, and high-need populations. (Lead: Director of Financial Aid; AVP Enrollment Services)
- Pilot differentiated awarding strategies by program or student profile to maximize yield and retention, measured by ROI and yield within target populations. (Lead: Director of Financial Aid; AVP Enrollment Services)

Build belonging deliberately in the first six weeks

- Host “Find Your People” events that intentionally connect students by identity, major, and interest within the first six weeks. Measures: attendance and repeat participation; belonging index scores from surveys. (Lead: Director of Belonging & Engagement)
- Expand new student programming focused on connection in the first six weeks of the term. (Lead: Director of Belonging & Engagement)

Targets

Targets carried by this objective: FAFSA submission rate from a 78% baseline to a projected 81% by AY 2027 (aspirational 83%); percentage of returners to residence halls (Shasta and McLoughlin, fall to fall) from a 39.2% baseline against a 36.9% AY 2025 actual.

Watch items: the vacant Care Coordinator position is eliminated under the Vitality Plan and care cases are dispersed among existing colleagues; positions funded through ASSOU incidental fees are eliminated following a 16% fee allocation reduction; and the discontinuation of GPA-incentive housing remissions changes the affordability picture for some students. The residence hall returner rate already came in below projection in AY 2025 (36.9% against a 38% projection), so the housing changes should be monitored against that measure directly.

Objective 1d. Personal and Professional Development

Connect SOU students with external stakeholders, both to enhance their educational journey through experiential learning and as a foundation for current and post-graduation employment opportunities.

Key performance indicators (as adopted)

- Number of career experience opportunities and placements, including percentage of students participating in undergraduate research and/or creative projects, Career Services utilization and placement, student worker positions available and employed (work study versus employer-paid), and First Destination responses
- Equity gap tracking: participation rates in the above, disaggregated by race/ethnicity, first-generation status, and Pell eligibility
- Feedback and response from the business community on student readiness

Vitality Plan strategies and tactics

Make practical and experiential work the curriculum

- Require work or service experience directly connected to the academic experience — practicum, internships, campus, or other work experience — at different stages of the curriculum.

- Graduate every student with a portfolio of real work for real audiences with real stakes: performances staged, research published, ventures launched, watersheds restored, communities served.
- Use intensive terms to open off-season internship and fieldwork windows.

Operationalize community connectedness

- Connect all academic and student activities directly to community businesses, enterprises, agencies, and organizations.
- Engage regional employers as strategic partners in program design and placement.
- Strengthen community partnerships for student recruitment and internship placement, beginning with the programs carrying explicit benchmarks.

Redefine credentials around what employers and adult learners actually need

- Redefine the meaning of a certificate at SOU to meet industry-specific needs, focused on employer-recognized skills and what adult learners will take.
- Streamline certificates that add value for traditional students within their program of study.
- Develop and promote credit for prior learning options for certifications and work experience, beginning in social service and behavioral health.
- Explore continuing education offerings for practicing professionals.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan gives this objective its structural mechanism — standing committees that put employers in the room — and its outcome measure.

Connect curriculum to career by design

- Establish “Curriculum-to-Career” committees by division or college that include faculty, advisors, and external stakeholders. Measures: percentage of graduates employed in field or continuing education within six months; employer satisfaction scores from surveys or focus groups. (Lead: Dean)

Put students in front of working professionals

- Build a “Community Connect” program matching students with local nonprofits, artists, or business leaders for short-term projects or volunteer opportunities, measured by the percentage of students participating in community-based learning or volunteering. (Lead: Director of Career Connections)
- Host “Purpose Pathways” events highlighting alumni, local professionals, and changemakers. Measures: attendance; percentage of students completing a career interest inventory. (Lead: Director of Alumni Relations)

Alignment note: the employer satisfaction measure in the Curriculum-to-Career initiative is a direct instrument for the adopted KPI “feedback and response from the business community on student readiness,” which otherwise has no defined collection method.

Priority 2: Team Thriving

Priority 2 concerns the faculty and staff who remain after three consecutive rounds of reductions totaling 217.45 FTE across SOU FORWARD, the Resiliency Plan, and the Vitality Plan. The Vitality Plan's contribution to this priority is mostly structural rather than compensatory: it changes how work is organized, how decisions are made, and how the institution talks to itself. The Future-Ready Enrollment Plan touches this priority indirectly but materially — it assigns roughly thirty named commitments to a small set of directors and deans, and those assignments have to be reconciled with a smaller workforce.

Workflows for this priority

- Investment Plan (Compensation & Marketing)
- Engagement Plan (communications / engagement / Campus Conversations)

Objective 2a. Compensation

Provide a competitive and attractive compensation schedule for all SOU faculty and staff members.

Key performance indicators (as adopted)

- Comparison of SOU salaries to established benchmarks
- Percentage of employee turnover attributable to compensation (exit interview data; requires a digital exit process)

Vitality Plan strategies and tactics

Create the fiscal capacity that compensation improvements require

- Deliver the Vitality Plan's recurring savings so that recurring revenues exceed costs and a compensation investment becomes possible without a new structural deficit.
- Direct the salary savings from the single Dean of Faculty model toward teaching, mentorship, and the distinctive SOU academic experience rather than administrative layers.

Use philanthropy and partner agreements to offset personnel costs

- Continue philanthropic salary offsets where they are appropriate and durable, including the men's wrestling head coach and the JPR executive director.
- Plan now for reinvesting in Development and Alumni Relations at the completion of the current comprehensive campaign, since the SOU Foundation's assumption of fundraising compensation has a defined shelf life.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan contains no compensation strategies. Its bearing on this objective is entirely through the revenue side of the equation.

Define the revenue envelope compensation must fit inside

- Hold gross tuition revenue at a projected $31,447,902 in AY 2027 against a 2024 baseline of $33,648,919 — a projected decline of roughly $2.2 million over the plan period, which the Vitality Plan's cost reductions must absorb before any compensation investment is available.

- Reduce the institutional undergraduate discount rate from a 15.73% baseline to a projected 13% by AY 2027, improving net revenue per enrolled student. (Lead: Director of Financial Aid; AVP Enrollment Services)

> Watch item: the Vitality Plan does not itself raise compensation. It creates headroom. Objective 2a therefore depends on a deliberate decision to allocate a share of future surplus to salaries, alongside reserves and marketing — and on the enrollment plan's revenue projections holding.

Objective 2b. Workload Distribution

Optimize the strategic distribution of responsibilities, processes and tasks among and between all SOU team members.

Key performance indicators (as adopted)

- Percentage of employee turnover attributable to workload (exit interview data)
- Faculty and staff survey results

Vitality Plan strategies and tactics

Count mentorship as workload, not as an addition to it

- Reflect the mentorship commitment explicitly in faculty workload: mentorship is counted, supported, and protected, not added on top of teaching loads.
- Ground workload, calendar, and program structures in the mentorship commitment rather than building them around it.

Use shared curriculum to make faculty loading sustainable

- Adopt clustering and shared cores, following the School of Education model of merging MAT/MSEd cores, to reduce low-enrolled course rotations and maximize faculty loading across similar cohorts.
- Account for the substantive curricular revision workload in the implementation plan rather than absorbing it invisibly.
- Recognize that faculty will be required to teach a wide breadth of content, and factor breadth into assignment decisions.

Redesign administrative workflows to match a smaller footprint

- Reorganize Business Services around data integrity, analysis, and reporting through a Business Intelligence Office combining financial data analysis, institutional research, and Workday management and governance.
- Realign the Service Center: move contracts to the General Counsel's office and driver clearance to Facilities Management and Planning, and retire the Service Center as a separate operational area.
- Redesign Facilities workflows and service levels around shared responsibility for campus facilities.
- Pursue shared services with Eastern Oregon University and Western Oregon University in Human Resources, cybersecurity, General Counsel, Title IX/Equity Grievance, contracting, and compliance, with definitive answers no later than December 2026.

Apply a workload-sustainability test to every change

- Retain the Vitality Plan's evaluation red flag against proposals that sustain or increase current program and curricular complexity without the personnel to maintain it.

- Cross-train Student Success Coordinators so caseloads are equitably distributed under the centralized model.
- Honor the APSOU and SEIU collective bargaining agreements throughout implementation.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan is the only one of the three plans that names an owner for every commitment. That is a workload distribution decision, and it should be read as one.

Distribute accountability through named Lead Partner Reports

- Assign every initiative a Lead Partner Report and a named owner, spanning Advising & Orientation, Belonging & Engagement, Financial Aid, Admissions, Marketing, Outreach & Engagement, Career Connections, Alumni Relations, Instructional Support and CATL, Tutoring, the Bursar, Institutional Research, the Provost's Office, Deans, and the AVP of Enrollment Services.
- Use the reporting structure as the coordination mechanism across divisions rather than creating new standing bodies.

Extend enrollment work into faculty roles deliberately

- Launch a Faculty Ambassador Program, measured by membership and activity. (Lead: AVP Enrollment Services)
- Establish Curriculum-to-Career committees by division or college, which add a standing faculty and advisor commitment. (Lead: Dean)
- Account for both in faculty workload planning rather than treating them as voluntary additions.

> Watch item: the Future-Ready Enrollment Plan concentrates ownership heavily. The Director of Advising & Orientation leads four initiatives, the AVP of Enrollment Services four, the Director of Admissions three, and the Director of Financial Aid three — while the Vitality Plan reduces Student Affairs and Enrollment Management by 7.95 FTE. Confirm that each named owner still exists in the post-Vitality structure and has the capacity assumed.

Objective 2c. Morale and Campus Culture

Manage processes, procedures and expectations to allow all SOU team members the flexibility to achieve a harmonic equilibrium between their personal and professional lives.

Key performance indicators (as adopted)

- Attendance at and number of employee morale events and opportunities
- Vacation day balances and utilization, including tracking the number of lost vacation days
- Percentage of employee turnover due to inability to attain work/life balance (exit interview data)
- Number of employee recognition events and opportunities, and percentage of employee attendance

Vitality Plan strategies and tactics

Hold to the guiding principles through implementation

- Apply the nine guiding principles that governed SOU FORWARD, the Resiliency Plan, and the Vitality Plan: integrity, primacy of students and the university, transparency, compassion, long-term vision, belonging and inclusion, universality, humility, and unity.
- Maintain the disciplined, clear-eyed, and humane standard the plan sets for decisions that affect colleagues.

Make an intentional commitment to cultural healing

- Treat long-term emotional and cultural healing as an explicit institutional objective following five consecutive years of reductions.
- Support all employees, both those departing and those remaining, and state publicly that reductions did not reflect the caliber or contributions of any individual.
- Prioritize voluntary separations, vacancies, and retirements ahead of involuntary reductions.

Sustain transparency and shared voice as standing practice

- Continue the Transformation Advisory Committee model, which brought together student, faculty, and staff leaders, all three shared governance entities, both union partners, and Board members.
- Keep an always-on feedback portal open to campus and community contributors, and publish how contributions were used, following the model of the Vitality Plan's community engagement cross-reference.
- Continue Campus Conversations and public reporting of progress.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan's contribution here is a governance habit: a standing cross-divisional council with public measures and named owners.

Sustain the Enrollment Council as cross-divisional practice

- Maintain the Enrollment Council as the body convening Academic Affairs, Student Affairs, Enrollment Services, Financial Aid, Marketing, Institutional Research, and Advancement around a shared set of measures.
- Update all metrics annually against a stated point-in-time reference, so progress is visible rather than asserted.
- Publish aspirational, optimistic, and projected scenarios side by side rather than a single number, which makes the gap between ambition and expectation an explicit conversation.

Naming note: the strategic plan's summary matrix labels this objective “Work/Life Balance” while the objective detail names it “Morale and Campus Culture.” Both refer to the same objective; the detail language is used here.

Priority 3: Institution Thriving

Priority 3 is where the Vitality Plan does its heaviest work and where the Future-Ready Enrollment Plan is most directly the delivery vehicle. The Vitality Plan was constructed to close a structural imbalance identified at roughly $20 million and to move SOU to a state where recurring revenues exceed recurring costs. The Future-Ready Enrollment Plan sets the revenue side of that equation and is named in the adopted strategic plan as a workflow for this priority. The two must be read against each other: the enrollment plan's projected case, not its aspirational case, is what the cost model has to survive.

Workflows for this priority

- Resiliency Plan
- Investment Plan (Reserves & Marketing)
- Financial Management Plan
- Engagement Plan (communications / engagement / Campus Conversations)
- Future-Ready Enrollment Plan

Objective 3a. Enrollment

Stabilize and optimize enrollment and tuition revenues to benefit the institution.

Key performance indicators (as adopted)

- Student credit hours per year for undergraduate in-state, undergraduate out-of-state, and undergraduate WUE
- Remissions dollars per year for undergraduate in-state, undergraduate out-of-state, and undergraduate WUE

Vitality Plan strategies and tactics

Execute the recruitment investments already authorized

- Complete the targeted new student outreach contract authorized by the Board of Trustees in February 2026.
- Launch the redesigned website focused exclusively on recruiting prospective students.
- Consider strategic investment of future surplus resources in marketing and recruitment alongside building fiscal reserves.

Recruit on distinction rather than breadth

- Market SOU as small by choice and distinctive by design — the Rogue Valley as classroom, mentorship as method, and experiential work as curriculum.
- Protect student audience legibility: do not rename recognized disciplines to generic titles that make programs invisible to prospective students.
- Apply the Distinction filter — would a prospective student choose SOU specifically because of how we offer this program — to program and marketing decisions.

Hold programs to enrollment benchmarks

- Human Service: attain 60 total majors by September 2028 and 90 total majors by September 2029; launch an online major pathway available to students starting September 2027; ready the joint licensed behavioral health practitioner program with PSY-SOAN by September 2028.
- Media Innovation: attain 30 total majors by September 2028 and 40 total majors by September 2029.
- Apply the “on the clock” designation to any program failing at least three of the four decision filters, triggering redesign or sunsetting within a defined window.

Build and defend the transfer and early-college pipelines

- Establish clear transfer articulation pathways for every major and align General Education to the statewide pattern.
- Deepen the Rogue Community College partnership, including the updated Higher Education Center agreement in downtown Medford.
- Use Youth Programs and Advanced Southern Credit to strengthen the recruitment pipeline, recognizing that non-degree-seeking enrollment grew 37% over the last decade even as undergraduate student credit hours fell 38%.
- Position Youth Programs to operate within a budget that no longer includes ASC funding by Summer 2027 while preserving its pipeline function.

Treat retention and completion as enrollment strategy

- Recognize that an increase in overall retention has a dramatic effect on long-term financial health, and resource it accordingly.
- Use accelerated and stackable pathways (Degree-in-3, 3+1, 4+1) to shorten time to degree and reduce melt.
- Evaluate a semester-aligned or block-structured academic calendar as a potential attractor for Oregon students and a contributor to increased tuition revenue.

Future-Ready Enrollment Plan strategies and tactics

This objective is the Future-Ready Enrollment Plan's home. Its Marketing domain is the operational recruitment strategy, and it works against a stated headwind: SOU experienced a 14% decline in first-time full-time enrollment between 2010 and 2023, Oregon demographic projections indicate a further 8% decline in the traditional college-age population between 2023 and 2035, and other Oregon universities are increasing their share of the available market.

Widen and diversify the top of the funnel

- Increase and diversify the prospect and inquiry pool. Measures: percentage increase in inquiry pool; conversion rate by source code from inquiry to application. (Lead: Director of Admissions; Director of Outreach & Engagement)
- Increase undergraduate application volume through new and existing initiatives informed by historical data and the current landscape. Measures: percentage increase in application volume; funnel by territory; funnel by student type (first-year, transfer). (Lead: Director of Admissions)
- Increase campus visitors and in-person engagement through expanded and intentional on-campus opportunities. Measures: percentage increase in participants; funnel by event; percentage of visitors reporting increased likelihood to apply or enroll after the event. (Lead: Director of Admissions)

Convert interest into enrollment

- Strengthen digital brand presence through web and social analytics — monitoring traffic by academic program page, consistent branding, career outcomes, student stories, and alumni success metrics. Measures: percentage increase in unique visitors to academic program pages; time-on-page and bounce rates for key program pages. (Lead: Director of Marketing)

- Pilot marketing campaigns for key programs with enrollment or market-share growth potential, measured by ROI based on yield. (Lead: Dean)
- Launch a Faculty Ambassador Program, measured by membership and activity. (Lead: AVP Enrollment Services)
- Conduct targeted FAFSA and scholarship outreach for incoming students. (Lead: Director of Financial Aid)

Use price deliberately rather than by default

- Stabilize the remissions model and conduct a comprehensive audit of the current model, aligning remission with strategic enrollment priorities including first-generation, high-achieving, transfer, graduate, and high-need populations. Measures: ROI; yield. (Lead: Director of Financial Aid; AVP Enrollment Services)
- Pilot differentiated awarding strategies by program or student profile to maximize yield and retention, measured by ROI and yield within target populations.

Build the pipelines the demographic trend makes necessary

- Nurture and expand high school, community college, and community pipelines and partnerships through MOUs and data-sharing agreements. Measures: funnel by partnership; number of new partnerships established. (Lead: AVP Enrollment Services)
- Administer a rolling "Return to SOU" communication plan for stop-out students with 90 or more credits, measured by re-enrollment rate disaggregated by demographics. (Lead: AVP of Enrollment Services)

Targets

Targets carried by this objective: new undergraduate headcount from an 810 baseline to a projected 790 by AY 2027 (aspirational 810); undergraduate fall FTE from 2,371 to a projected 2,225 (aspirational 2,280.4); graduate fall FTE from 273 to a projected 285 (aspirational 291.5); core revenue student credit hours from 118,218 to a projected 102,521 (aspirational 110,718); undergraduate yield from 29.83% to a projected 31.11% (aspirational 32.04%).

Watch item: the projected case is a managed decline, not growth. Core revenue student credit hours are projected to fall roughly 13% from the 2024 baseline by AY 2027, and undergraduate fall FTE to sit about 6% below baseline. Only the aspirational case approaches stabilization. The Vitality Plan's savings target should be tested against the projected case, and the gap between projected and aspirational should be stated explicitly whenever this objective is reported.

Objective 3b. Financial Stability

Establish and maintain a positive operating margin to support long-term viability and resilience to financial shocks, allowing for mission fulfillment as well as investment.

Key performance indicators (as adopted)

- Reserve ratio, compared to the cost of one full fall term of expenses
- Cash flow stability
- Net operating revenues ratio (revenues greater than costs)

Vitality Plan strategies and tactics

Deliver the full savings target

- Implement the Vitality Plan's savings across the academic portfolio, student affairs and enrollment management, the administrative footprint, dining services, intercollegiate athletics, the Farm at SOU, and Jefferson Public Radio, together with the Resiliency Plan carryforward — a combined total of approximately $20.2 million against the roughly $20 million structural target.
- Apply the “Fiscal Reduction First” standard: every proposal must demonstrate credible, recurring savings beyond its academic or historical merit.
- Eliminate multiple software contracts, with Banner the largest, totaling more than $1 million by the end of FY 2027.

Move auxiliaries to self-sustaining fiscal models

- The Farm at SOU: transition fully to a self-support model by December 31, 2026, in collaboration with regional non-profit and for-profit farming enterprises.
- Jefferson Public Radio: shift operational responsibilities to the JPR Foundation while SOU retains the FCC licenses, reaching 99.3% self-support in FY 2027.
- Schneider Museum of Art: remain 100% self-sustaining through memberships, donor cultivation, foundation support, grants, and sponsorships.
- Intercollegiate Athletics: close a $1.5 million annual gap through permanent cost reductions and philanthropy, and become fully self-sustainable by the start of FY 2029.
- Housing and Dining: sustain the efficiency and pricing changes already yielding more than $1.1 million annually.

Pursue the revenue opportunities that reduce dependence on cuts

- Reorganize the university's debt service on the Raider Village student housing project, with the potential of state bonding authority, for an estimated $2.7 million annually in net positive cash flow on a continuing basis.
- Advance the Older Adult Living Community on the former Cascade Complex site, aided by potential Opportunity Zone designation.
- Explore locating City of Ashland offices, council meeting space, and gathering spaces on campus while the City Hall facility is rehabilitated.
- Expand the La Clinica campus footprint as a revenue stream alongside broadened healthcare access.
- Complete the $100 million comprehensive campaign, which has reached $67 million in five years, and plan for the reinvestment decisions that follow it.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan supplies the tuition revenue assumptions the whole financial model rests on, and two levers for improving net revenue without adding students.

Hold the tuition revenue line

- Track gross tuition revenue (undergraduate and graduate) against a 2024 baseline of $33,648,919, with projections of $32,934,919 in AY 2025, $31,981,774 in AY 2026, and $31,447,902 in AY 2027.
- Note that these figures are sourced from the enrollment projections on the pro forma as of August 26, 2025, and predate the Vitality Plan restructure.

Improve net revenue per student through discount discipline

- Reduce the institutional undergraduate discount rate — unfunded remission as a share of gross revenue — from a 15.73% baseline to a projected 15% in AY 2025, 14% in AY 2026, and 13% in AY 2027. (Lead: Director of Financial Aid; AVP Enrollment Services)

- Conduct the comprehensive remissions audit and align remission with strategic enrollment priorities, measured by ROI and yield.
- Pilot differentiated awarding by program or student profile, measured by ROI and yield within target populations.

Protect auxiliary revenue through retention in housing

- Track the percentage of returners to residence halls (Shasta and McLoughlin, fall to fall) against a 39.2% baseline, with a 36.9% actual in AY 2025 and a 39% projection for AY 2026.

> Watch item: on the enrollment plan's projected case, gross tuition revenue falls roughly $2.2 million between the 2024 baseline and AY 2027. That decline is concurrent with, not funded by, the Vitality Plan's $20.2 million in savings. Confirm which enrollment scenario the Vitality Plan pro forma assumes.

Objective 3c. Effective Financial Management

Establish transparent processes and procedures to allow for an optimized management and oversight of budgets, cash flow, and strategic resource decision-making.

Key performance indicators (as adopted)

- Continued progress toward Workday implementation (number of issues identified and resolved in a year)
- Percentage of budget managers with access to budget reports and information
- Percentage of budget managers with training for decision making
- Fidelity of fiscal information — implementation of CLA report recommendations

Vitality Plan strategies and tactics

Build the data capability the last two years exposed as missing

- Stand up a Business Intelligence Office combining financial data analysis, institutional research, and Workday management and governance.
- Resolve the data visibility gaps in Workday that contributed to the early-2026 liquidity crisis, in which paper budget stabilization masked an actual cash trajectory projected to breach the mandatory minimum threshold.
- Sunset Banner and the associated software contracts as the Workday environment stabilizes.

Push budget authority and literacy to the unit level

- Give department chairs direct input into academic and programmatic resource decisions under the single Dean of Faculty model.
- Deliver quarterly chairs training sessions covering budget tools and accountability.
- Improve data analysis and transparency in Business Services in direct response to campus feedback.

Institutionalize the Vitality Plan's decision discipline

- Validate proposals against five structured data points: eliminations, redesigns, positions cut, cash savings, and timeline.
- Assess foreseeable second-order effects before approval — downstream revenue loss, stranded costs, contractual obligations, cross-program academic dependencies, marketability, regional partnerships, and workload.

- Add a Chief Information Officer/Chief Information Security Officer for strategic oversight of technology and cybersecurity risk.
- Publish transparent progress reporting on savings, enrollment, retention, service levels, and risks.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan models the reporting discipline this objective calls for, and defines the enrollment data infrastructure the financial model depends on.

Report against three scenarios, not one number

- Publish aspirational (+3%), optimistic (+1%), and projected values alongside actuals for every institutional metric, so variance is visible as it emerges.
- Update all metrics annually against a stated point-in-time reference date.
- Define metric composition explicitly — core revenue student credit hours, for example, comprise WUE, undergraduate resident, Jackco Pledge, undergraduate non-resident, graduate resident, graduate non-resident, RisePoint MBA, RisePoint MS.Ed, and MEDU, and exclude staff, waivers, course-based, ASC, and Early Entry credit hours.

Build the funnel and outcome reporting the institution lacks

- Maintain a Lead Partner Report for every initiative, with a named owner accountable for the measure.
- Track conversion rate by source code, funnel by territory, funnel by student type, and funnel by partnership. (Lead: Director of Admissions; AVP Enrollment Services)
- Use Institutional Research to run curriculum equity audits producing DFWI rates disaggregated by identity and persistence gaps by race/ethnicity, gender, and income status. (Lead: Institutional Research)
- Establish data-sharing agreements as part of high school and community college partnership MOUs. (Lead: AVP Enrollment Services)

Alignment note: the Vitality Plan's Business Intelligence Office — combining financial data analysis, institutional research, and Workday governance — is the natural home for the Future-Ready Enrollment Plan's Lead Partner Reports. Consolidating them avoids two parallel reporting systems built on the same underlying data.

Objective 3d. Collaboration With External Community Partners

Cultivate an environment where university departments are encouraged to foster connections with external partners to further university goals.

Key performance indicators (as adopted)

- Number of employers engaged in university partnerships
- Number of departments engaged with external partners

Vitality Plan strategies and tactics

Make community connection a structural feature, not an aspiration

- Connect all academic and student activities directly to community businesses, enterprises, agencies, and organizations, moving beyond buzzwords to operationalized connectivity.

- Leverage the intellectual and creative energies of students, faculty, and staff to address locally important strategic issues for community partners.
- Teach with and through the bioregion, the arts ecosystem, the rural economy, Indigenous lands, and the wilderness across every program.

Deepen the anchor institutional partnerships

- Rogue Community College: sustain the largest community college feeder relationship and the shared Higher Education Center in downtown Medford under the modified contract.
- Eastern Oregon University and Western Oregon University: conclude the shared-services discussions by December 2026.
- La Clinica: pursue the expanded Student Health and Wellness Center footprint and regional health-professions role.
- City of Ashland: explore co-location of city functions on campus.
- JPR Foundation and the SOU Foundation: execute the revised support structures while preserving the relationships.
- Rogue Valley Farm to School: sustain the Farm at SOU's regional garden education role serving more than 1,000 students from more than a dozen schools.

Engage regional employers and cultural institutions as strategic partners

- Weigh impact on the Rogue Valley ecosystem — including partnerships such as the Oregon Shakespeare Festival, Lithia, and Asante — in every program decision.
- Bring regional employers into program design, internship placement, and student readiness feedback.
- Expand regional and Tribal partnerships as part of the bioregional identity.

Future-Ready Enrollment Plan strategies and tactics

The Future-Ready Enrollment Plan converts partnership from a relationship into a measured pipeline, and supplies the counting mechanism for both adopted KPIs.

Formalize the education pipelines

- Nurture and expand high school, community college, and community pipelines and partnerships through MOUs and data-sharing agreements. Measures: funnel by partnership; number of new partnerships established. (Lead: AVP Enrollment Services)

Put external partners inside the academic structure

- Establish Curriculum-to-Career committees by division or college that include external stakeholders alongside faculty and advisors, measured in part by employer satisfaction scores from surveys or focus groups. (Lead: Dean)
- Build the "Community Connect" program matching students with local nonprofits, artists, and business leaders for short-term projects and volunteer opportunities. (Lead: Director of Career Connections)
- Host "Purpose Pathways" events featuring alumni, local professionals, and changemakers. (Lead: Director of Alumni Relations)

Alignment note: "number of employers engaged in university partnerships" and "number of departments engaged with external partners" can both be sourced directly from the Curriculum-to-Career committee rosters and the partnership funnel, which means this objective's KPIs become measurable without building a new instrument.

Cross-Plan Tensions and Open Decisions

Now that all three plans are in hand, the points below are where they genuinely conflict, where one plan assumes something another has changed, or where a decision has to be made before implementation can proceed. Each is stated with the specific action it calls for. None of them is a reason not to proceed; all of them are reasons to proceed with the question settled.

1. The projected enrollment case is a managed decline, not a recovery

On the Future-Ready Enrollment Plan's projected case, core revenue student credit hours fall from 118,218 in 2024 to 102,521 by AY 2027 — roughly 13% — and gross tuition revenue falls from $33,648,919 to $31,447,902, a decline of about $2.2 million. Only the aspirational case approaches stabilization. The Vitality Plan's $20.2 million in recurring savings is calibrated to reach a sustainable operating framework, but that calculation should be tested explicitly against the projected case rather than the aspirational one.

> **Action:** Confirm which enrollment scenario the Vitality Plan pro forma assumes, and state it in both documents.

2. The enrollment plan predates the academic restructure

The Future-Ready Enrollment Plan's data reflects a point in time of 10/19/2025 and its revenue figures come from the pro forma as of 8/26/2025. The Vitality Plan was finalized July 21, 2026 and reshapes the academic portfolio to 30 majors, retires Music Industry and Production, consolidates departments, introduces six Academic Cornerstones, and sets new major-count benchmarks for Human Service and Media Innovation. Marketing initiatives that target "key programs with enrollment or market share growth potential" and application-volume campaigns are aimed at a portfolio that has since changed.

> **Action:** Refresh the enrollment plan's program-mix and marketing assumptions against the post-Vitality portfolio before the next annual update.

3. Named owners must be reconciled with a smaller workforce

The Future-Ready Enrollment Plan assigns a Lead Partner Report to a named role for nearly every initiative, concentrated in a handful of positions: the Director of Advising & Orientation leads four, the AVP of Enrollment Services four, the Director of Admissions three, and the Director of Financial Aid three. The Vitality Plan reduces Student Affairs and Enrollment Management by 7.95 FTE, eliminates the vacant Care Coordinator position, removes positions funded through ASSOU incidental fees, and centralizes and cross-trains Student Success Coordinators.

> **Action:** Confirm each named owner exists in the post-Vitality structure with the capacity assumed, and re-scope or re-sequence initiatives where it does not.

4. "Dean" as an owner no longer describes a role

The Future-Ready Enrollment Plan names Deans as the lead partner for three initiatives: student-faculty relationships, Curriculum-to-Career committees, and key program marketing. The Vitality Plan replaces the multiple-dean model with a single Dean of Faculty reporting to the Provost and working directly with department chairs, and reduces administration by 2.00 FTE at the dean level.

> **Action:** Reassign these three initiatives to the Dean of Faculty, department chairs, or the Provost's Office explicitly.

5. Housing strategies pull against the housing metric

The Future-Ready Enrollment Plan tracks the percentage of returners to Shasta and McLoughlin halls, which came in at 36.9% in AY 2025 against a 38% projection and a 39.2% baseline. The Vitality Plan discontinues GPA-incentive housing remissions and targets filling unused housing capacity — measures that improve the housing margin but may further depress the returner rate.

> **Action:** Model the net effect on both auxiliary revenue and the returner metric before the next housing rate and remission cycle.

6. The fastest-growing student segment is measured by none of the three plans

The adopted strategic plan flags a KPI for non-degree-seeking students as still to be defined. The Future-Ready Enrollment Plan explicitly excludes OLLI and Advanced Southern Credit from every enrollment metric. The Vitality Plan reports non-degree-seeking enrollment growing 37% over the last decade — from 6,101 to 8,413 credit hours — while undergraduate credit hours fell 38%, and it moves Advanced Southern Credit revenue out of the Youth Programs budget by Summer 2027.

> **Action:** Define the non-degree-seeking KPI and decide whether it belongs in the enrollment plan's institutional metrics.

7. Discount rate reduction and differentiated awarding need reconciling

The Future-Ready Enrollment Plan targets reducing the institutional undergraduate discount rate from 15.73% to 13% while simultaneously piloting differentiated awarding strategies to maximize yield, and the adopted strategic plan's Objective 3a tracks remissions dollars by residency category. These can be complementary or contradictory depending on how the remission audit is scoped.

> **Action:** Ensure the comprehensive remissions audit resolves the discount-rate target and the yield-maximization pilot into a single awarding strategy.

8. The proposed mission and vision are not yet adopted

The Vitality Plan carries a proposed revised mission and vision — the Rogue Valley as classroom, mentorship as method, experiential work as curriculum; small by choice and distinctive by design. Until the Board adopts them, the strategic plan and the Vitality Plan describe the institution differently, and the enrollment plan's brand and messaging work has no settled foundation to build on.

> **Action:** Take the proposed mission and vision to the Board, since the marketing and digital brand initiatives depend on the answer.

9. Objective 2c carries two names

The adopted strategic plan's summary matrix labels this objective “Work/Life Balance”; the objective detail names it “Morale and Campus Culture.” The two describe meaningfully different scopes.

> **Action:** Choose one name and one scope.

10. Compensation depends on an allocation decision no plan makes

Objective 2a requires competitive compensation. The Vitality Plan creates fiscal capacity but does not allocate it; the Future-Ready Enrollment Plan contains no compensation strategies. The Investment Plan workflow names compensation, reserves, and marketing together without a split.

> **Action:** Decide the allocation among compensation, reserves, and marketing, and publish it.