

**Northwest Commission on Colleges and Universities**

**A Full-Scale  
Evaluation Committee Report**

**SOUTHERN OREGON UNIVERSITY**

**Ashland, Oregon**

**October 24–26, 2007**

**A Confidential Report Prepared for the  
Northwest Commission on Colleges and Universities**

**That Represents the Views of the Evaluation Committee**

**Evaluation Committee Report**

**Southern Oregon University  
Ashland, Oregon  
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## **Introduction**

Southern Oregon University has evolved as an institution of higher education in the Rogue Valley for more than one hundred years. In 1895 it became Southern Oregon State Normal School and was named Southern Oregon College in 1956. As a member of the Oregon University System it was re-named Southern Oregon University in 1997.

SOU offers baccalaureate degrees in the liberal arts, sciences and several professional fields. It also provides a selected number of graduate programs as well as educational programs that serve the needs of the local and regional community. In more recent times, Southern Oregon University has partnered with other higher education institutions to help achieve its outreach mission, including its association with Rogue Community College.

Since the last full-scale evaluation of SOU in 1997, several substantive and minor changes have been considered for accreditation action. These changes include the initiation of new degree and degree-completion programs, including the offering of online degree programs.

In recent years, a continuing significant issue for the university has been the effectiveness of its institutional planning efforts and the impact that this planning has had upon the budget stability of the institution. This instability has been exacerbated by the generally declining support for higher education by the State of Oregon and the decline of student enrollments and FTE at SOU. Budget reductions and tuition increases have been a natural outgrowth of this fiscal situation. A major challenge for SOU in the near future will likely be the strengthening of its planning processes to help clarify its mission and goals and to provide direction for resource allocation and future initiatives of the university.

### **Report on the Self-Study**

The SOU self-study process has been self-identified as “complex” and has been impacted by the changes in key university leadership positions in recent years. The Center for Teaching, Learning and Assessment developed various process-related materials that greatly facilitated the self-study. These materials included templates for data analysis, flow charts, and other self-study tools that were used by document contributors.

The Evaluation Committee found that the goal of broad, campus-wide involvement in the accreditation self-study was met to a reasonable degree. Key administrative, faculty, and staff personnel were actively engaged throughout the self-study process, and the development of web-based materials assisted in the study. It appears, however, that the degree of involvement within and among the various SOU constituencies in the self-study process varied substantially. The major findings and conclusions of the self-study were supported by all interviewed personnel.

The content of the self-study was informative, well-written and portrayed the university in a candid and open fashion. Individual chapters appropriately addressed the elements of the accreditation standards, although the Evaluation Committee would have preferred a greater degree of analysis and synthesis of information and less description. In general, exhibit materials assisted in facilitating a deeper understanding of identified topics. However, there was significant variability in the quality of documentation associated with departmental self-studies.

The self-study contents were verified by several methods, including interviews with key administrators and a wide range of faculty, staff and students. Discussions were also held with members of the Oregon State Board for Higher Education, the Southern Oregon University Foundation Board, and the SOU Advisory Board. The Chancellor of the Oregon University System was also interviewed. Institutional and state websites were examined, as well as exhibit documentation. Additional verification was done by one Committee member who visited the SOU site in Medford.

### **Eligibility Requirements**

The Evaluation Committee reviewed compliance with the Eligibility Requirements and judged that they had been met.

## **Standard One**

### **Institutional Mission and Goals, Planning and Effectiveness**

#### **Mission and Goals**

The mission of Southern Oregon University is governed by the policies and actions of the Oregon State Board of Higher Education (OSBHE). Its current mission statement includes “*Southern Oregon University is a contemporary public liberal arts and sciences university...The university is a vital partner in the...development of its region and state...It is Oregon’s Center of Excellence in the Fine and Performing Arts.*” There exists significant uncertainty among some SOU constituencies as to whether the university mission is to be a ‘regional comprehensive university of the Oregon University System’ or ‘Oregon’s premier undergraduate liberal arts college’, or both. Presently, the university is engaged in a substantial effort to re-define its mission and goals to help address this issue which should provide clarity to future strategic planning processes.

Since the last full-scale evaluation visit, Southern Oregon University has joined the Council of Public Liberal Arts Colleges (COPLAC). This status has contributed to the discussion surrounding the mission and goals of SOU. An additional factor related to mission clarity is that the State Board has been recently engaged in a major strategic planning exercise and intends to develop in conjunction with each member university a mutually agreed upon institutional mission.

The current mission and goals of SOU do provide appropriate direction to the educational activities of the university. SOU’s public service and outreach are also consonant with its mission and goals. University goals, established by the SOU Executive Council and vetted by the OSBHE, are consistent with the mission and vision of the institution.

#### **Planning and Effectiveness**

Southern Oregon University has engaged in several major planning efforts in recent years. These efforts have been significantly impacted by leadership changes within SOU and by limited financial resources allocated to planning. Additionally, fiscal instability in recent years has negatively affected the institution’s ability to engage in systematic planning for, and evaluation of, its activities, including teaching, research, and public service consistent with its mission and goals. A key limitation in the effectiveness of university-level planning appears to be the lack of a centralized institutional research operation within SOU.

The Retrenchment 2007 Plan represents SOU’s most recent efforts to building a sustainable university. Because of declining enrollments and revenues over the last several years, this plan was developed to ‘right size’ SOU’s programs and budget and to meet OSBHE’s minimum fund balance requirements. This three-year plan, finalized in March 2007, appears to be an initial positive step in the integration of SOU’s evaluation and planning processes to identify institutional priorities for improvement.

Planning processes at Southern Oregon University are participatory and involve constituencies that are relevant to the planning activity. The University Planning Council is an example of an appropriately-represented and collaborative structure that facilitates institutional planning at SOU. However, the effectiveness of ongoing institutional planning as a means to influence resource allocation and program evaluation appears to remain a significant issue.

### **Recommendation**

It is recommended that SOU act quickly to finalize its new mission statement and to use this statement to develop an institutional strategic plan that addresses resource allocation, program development, and future initiatives of the university. (Std. 1.A – Mission and Goals, Std. 1.B – Planning and Effectiveness)

## **Standard Two Educational Program and Its Effectiveness**

### **THE COLLEGE OF ARTS AND SCIENCES**

As a result of Retrenchment 2007, three Schools (Arts and Letters, Social Sciences, and Sciences) were combined into a College of Arts and Sciences (CAS) as of July 1, 2007. Fusing the three schools into one College has been accomplished on paper, but the implications for all departments and units within the new College are still being explored. For purposes of the subsequent text that follows, units of the new college will be discussed according to the current configuration of departments and schools, rather than their locations when the self study was prepared.

As evidenced by multiple measures, the new CAS configurations are welcomed by some units and seen as problematic by others. The new Department of Language, Literature & Philosophy, for example, is already working on its mission statement and investigating interdisciplinary initiatives in Rhetoric and Philosophy and in Comparative Literature. However, it appears that there is significant skepticism that the Performing Arts Department will be advantaged by becoming one department, given that collaborative activities have always been part of their relationship as separate departments. Other departments, such as Social Science, Policy & Culture, may be challenged to develop an appropriate role and curricular coherence in this new college structure.

The educational assessment issues that SOU faces are made more complicated by the new college configuration. Department leadership will be crucial to help units understand the role that developing, assessing, and tracking outcomes can have in clarifying their identities in the educational process. The establishment of new department missions and aligning these missions with educational outcomes and achievements should contribute to this clarification of identity.

Facilities for CAS departments remain a significant factor in achieving and maintaining high quality educational programs. The Theatre Arts program has anticipated a new building for several years but is currently teaching students in non-instructional spaces because student enrollments substantially exceed the original planned capacity. Deferred maintenance issues also appear to have impacted the effectiveness of some CAS programs.

An issue that many CAS departments appear to share is the concern about the expanded administrative functions being expected from chairs and regular faculty members, particularly with the simultaneous reduction in released time and expansion in responsibilities for continuing chairs. This concern, as well as a perceived increase in expectations for scholarship at a time when other faculty responsibilities are increasing, may result in difficulties in the identification of new department chairs.

## **Art & Art History**

The Art Department has recently changed its “one size fits all” capstone course to one that is integrated into the students’ concentration areas. The change is also tied to efforts to standardize capstone projects so that faculty can meaningfully evaluate outcomes. Other curriculum changes, such as requiring all majors to take courses in all studio disciplines, reflect a department actively interested in finding educational solutions for perceived program challenges. A thorough assessment plan, including a mid-point evaluation, will help to address these curriculum decisions. Workload constraints appear to limit the ability for planning and implementation of a comprehensive assessment plan.

Despite recent declines in student enrollments, the Art faculty believe that the new initiative in digital media foundations will aid enrollments because the program has clear career tracks. Large enrollments in lower division classes suggest that the situation is already improving. The art facilities, though among the newest on campus, have maintenance issues. The new facility also does not have studio space for faculty, which means that students do not get a sense of faculty as working professionals, an important means of modeling student performance.

## **Communication**

Communication has historically been a high-enrollment department at SOU, but has recently declined in majors. The reassignment of Communication faculty to University Seminar and other units appears to have stretched the department’s ability to cover its curriculum, and has resulted in minimal instructional flexibility. While the department is excited by the new interdisciplinary program in digital media foundations being developed, the impact on its own curriculum is not clear. The development of specific curriculum requirements for this program will likely allay some departmental worries and encourage the development of other new initiatives.

The department faculty have initiated a new methodology for assessing student outcomes, focusing on gateway and capstone courses. The faculty have analyzed each course to evaluate how it contributes to skills, disposition, and knowledge outcomes in the major concentrations. The department feels most in need of a method of pre-testing students to establish a base against which to compare mid-point and capstone evaluations. A significant departmental issue has been the re-evaluation of its curricula in order to respond to changes in technology that impact journalism, film, and video concentrations.

## **Language, Literature & Philosophy**

This new department, composed of the former Departments of English and Writing and Foreign Languages and Literatures, as well as programs in Philosophy and Shakespeare Studies, is still investigating the possibilities of the new configuration. The department is developing a new mission statement and is already considering interdisciplinary options in Rhetoric and Philosophy, Cultural Studies, and possibly Comparative Literature. Given that this is one of the largest departments at SOU, both in faculty numbers and student enrollments, the impacts of any

new curricular structures or educational initiatives will likely be quite significant for the university.

The English and Writing faculty of the department have recently revised the curricular structure in order to help address student interests, including those of English Education students. Although capstone assessments have been used for many years, these new curricula serve as an impetus to develop ways to standardize assessment of the capstone and align expectations with each major. The English and Writing faculty of the new department are very active in service and scholarship, including substantial numbers of book publications and significant outreach efforts because of the Oregon Writing Project which is housed in the department. The Writing Project has positively impacted hundreds of public school teachers and thousands of students.

Foreign Languages and Literatures provides significant support for the Bachelor of Arts degree. Some other arts and humanities departments on campus also support the BA degree, but in addition provide students with a BS option, which does not require a foreign language. As SOU reevaluates its mission as a liberal arts institution, this issue will likely be a significant part of the discussion.

Foreign Languages and Literatures programs have some of the most standardized and consistently reviewed outcomes assessment measures. By using ACTFL oral and written standards at various points in the language programs, faculty are able to assess student achievement on a regular basis.

Shakespeare Studies has always had a close connection with the prior English and Writing Department, but the new department is still exploring ways to integrate this unit as well as the Philosophy program. It appears that this new structure will provide many opportunities as well as challenges for the new chair and the faculty.

### **Performing Arts**

Despite university-wide enrollment declines, the Theatre Arts portion of the new Department of Performing Arts is one of the few at SOU to experience continual growth, particularly among desirable out of state and out of region students. The close relationships with the Oregon Shakespeare Festival and with Oregon Cabaret Theatre are a clear strength of the program and several students are employed by these groups on graduation. However, facilities limitations negatively impact the Theatre Arts educational program. The building which houses this program serves significantly more students than was originally planned. Given the desirability in this discipline for as much personalized instruction as possible, it appears that the current student/faculty ratio limits the ability to achieve this goal. Theatre Arts has had to limit the numbers of students they accept as upper division majors.

Faculty in the music program are recognized nationally and internationally, which provides students unusual opportunities, such as the recent saxophone tour of China. The program faculty appear to be judicious in their curricular offerings, choosing to emphasize the expertise of the full-time faculty along with the use of many adjunct faculty to implement their curricula. Growth in student numbers has been gradual, but appears to be continuing. The music program

is accredited by the National Association of Schools of Music (NASM) which assists in documenting performance measures.

Both portions of the Performing Arts Department have a history of student assessment through regular performance juries. Music students have jury evaluations every quarter, with more thorough assessment on a yearly basis. The assessments include oral presentations on music history and theory as well as performance. The assessments are video-taped and faculty use these tapes to track student achievement and plan curriculum revision. Similarly, Theatre Arts faculty conduct regular evaluation of students and revise curriculum based on student achievement. Recent changes in the foundation sequence, for example, addressed the need for earlier instruction in script analysis. However, both the theatre arts and music programs do not systematically evaluate student performance data in order to make longitudinal comparisons and assessment-informed curriculum revisions.

### **Criminology and Criminal Justice**

The CCJ program has seen steady growth over the past decade and currently serves close to 300 majors on campus and off. The department enjoys success in the positive response it receives from students, a strong scholarship record of its faculty, and a high level of community involvement. The department views itself as flexible and proactive in the face of continued change at SOU.

The department has a mission statement that outlines its extensive role both in the university and in the region. The achievement of that mission, however, appears to be limited by the lack of specific metrics for gauging departmental effectiveness.

The department learning outcomes follow the model specified by the University. However, exit proficiency levels are not yet developed and assessment methods designed to assess student achievement on those outcomes also are not developed. Consequently, the curriculum is not regularly informed by assessment results. The department appears to have plans to address this deficiency.

Limited resources impinge on the ability of the department to facilitate student achievement. Faculty have been creative in finding appropriate curricular and advising solutions to help ensure student completion of their educational program.

### **Health, Physical Education, and Leadership**

The Department of Health, Physical Education, and Leadership serves approximately 200 majors and about 120 general education students per year. The department recently added a concentration in Outdoor Adventure Leadership, a program that it believes it will attract a significant number of new students.

The department's mission statement emphasizes its role in community-based learning. This civic engagement, and the department's additional foci on critical thinking, integrity, cultural understanding, inquiry, and respect contribute to the department's successful achievement of its

goals. However, additional specificity in the metrics used within the departmental plans would likely assist in improving overall effectiveness of its programs.

Defined exit proficiency levels have yet to be established and implemented, and assessment methods designed to measure student achievement with respect to those outcomes are in the early stages of development. Some initial data have been gathered to support and inform an overall department assessment plan. These initial efforts will require further development.

### **History and Political Science**

This new department was formed through the combining of two former, and smaller, departments. There exists significant optimism that the new configuration will be of benefit to both segments of the department. Both History and Political Science each have had their own mission statements, and as yet, a mission for the combined department has not been developed. Both departments had experienced reductions in staffing in the past few years, thus limiting the individual department's ability to meet the educational needs of its students.

Planning and assessment efforts were hampered by the lack of resources and the unstable atmosphere surrounding the two departments. History, for example, experimented with HIST 300 as a possible course to develop necessary skills for History majors, but the department faculty believe that the experiment was not successful. Both departments' learning outcomes generally follow the model specified by the university, although faculty differ in their opinion as to the appropriateness of this model. Neither program has developed exit proficiency levels nor added assessment methods designed to assess student achievement on those outcomes. Consequently, the curriculum is not regularly informed by assessment of student learning outcomes.

### **Psychology**

The Psychology Department offers both an undergraduate Psychology degree, and graduate degrees in Applied Psychology with programs in Mental Health Counseling, Human Services, and Organizational Training and Development. The department also has a strong service role that includes degree completion programs, course work in a number of regional degree programs, and a number of service courses for other departments on campus.

The department's mission statement refers to a liberal arts education and general intellectual capabilities in addition to specific knowledge in the different theories and methods of psychology. This mission statement also reflects the department's commitment to the basic skills emphasized in the university's general education program. The graduate programs offered by the department also have specific mission statements and both are also evaluated yearly. The department holds a regular yearly retreat to plan and evaluate its goals and activities for the year. This has been a highly positive practice for the department.

The department has begun using the Outcomes Knowledge Assessment test to assess student learning through departmental programs, but its use is sporadic. Current assessment needs include the inclusion of all department students in outcomes assessment, appropriate analysis of

data, and a structure to facilitate the use of these data to make educational program improvements.

### **Social Science, Policy, and Culture**

This new department was formed by combining six former programs and departments. The department includes Economics, Sociology and Anthology, International Studies, Native American Studies, Geography, and Women's Studies. Because the department was only recently formed, no department mission statement exists. Departmentally-based student learning outcomes and assessment plans have yet to be developed. Individual units within the department have their own plans, and those vary in specificity and progress. It appears that a significant issue will be the establishment of a departmental identity along with related mission and goals that will have a broad basis of consensus.

The new department is faced with issues of determining how to integrate its programs, leadership and resource allocation decisions, and the coordination of offerings to maximize shared resources.

### **Biology; Chemistry, Physics, Materials and Engineering; Computer Science Environmental Studies; Mathematics**

These five departments are in different stages of development with respect to the definition and measurement of learning outcomes for each of the degree programs offered. All programs have progressed in the development of appropriate tools for measurement of achievement of outcomes, although some departments appear to confuse program goals with learning outcomes. Assessment activities include a 300-level course that all Biology majors take to assess writing skills and the administration of the ACT Major Field Exam. Senior exit surveys and other student surveys also provide valuable assessment data. Additionally, most programs utilize a senior capstone course to provide an end-of-program assessment. Notable external assessment activities include the accreditation of the Chemistry program by the American Chemical Society (ACS) and the use of ACS standard examinations in senior-level courses. Furthermore, the Computer Science Department uses guidelines from its discipline-specific accrediting body to assist in curricular development and assessment.

Three of these departments are housed in the Science Building which consists of Science I, built in the 1960's and Science II, built in the 1970's. The laboratories in Science I appear to be minimally adequate to meet educational program goals and the Science II labs help facilitate a quality educational experience. The classrooms in both Science I and Science II are equipped with current technology to meet departmental goals. Facilities for the Computer Science and Mathematics Departments are housed in separate buildings and appear to be adequate for program goal achievement.

The programs housed in Science I and Science II have done an outstanding job of acquiring modern equipment for use in the various laboratories. This equipment was obtained through grants written by the faculty in the science departments. However, maintenance/replacement

funds for this equipment appear to be minimal. Maintaining and replacing this equipment will likely remain a significant university issue in the future.

## **THE SCHOOL OF EDUCATION**

The mission of the School of Education is congruent with the 1997 mission of Southern Oregon University. The mission reads: *We are teachers within a community of learners committed to preparing culturally competent educational leaders for the challenges of a changing and increasingly diverse democratic society. Our laboratories are the classrooms and world in which we teach, observe, and reflect.* Teacher preparation is built on a quality liberal arts and sciences education that prepares teacher candidates for individual development through critical and creative scholarship, practice, reflection, and social responsibility.

Partnerships with schools and agencies connect faculty and students to the world beyond the classroom and campus. Faculty members embrace the belief of teacher as reflective practitioner and lifelong learner, and they model these practices in the classroom and in the professional community.

The School of Education offers a new undergraduate early childhood degree program in partnership with Rogue Community College. Programs leading to licensure and/or graduate degrees are offered in the four tiers used for teacher licensure in Oregon, and a licensure program for school administration is offered. Program delivery occurs in Ashland and Medford and through distance delivery in the region.

Learning outcomes for the programs are derived from and consistent with the proficiencies imbedded in the Oregon Teacher Standards and Practices Commission (TSPC). Teacher and administrator candidates are assessed on these proficiencies in their courses and in their field experiences. Teacher candidates complete the TSPC-required teacher work sample and a portfolio with entries for each proficiency and a reflective summary. The assessment information is used to guide the professional development of individual students and to review program strengths and areas for improvement. Student performance data and student feedback are shared with the SOU Consortium (regional school practitioners) and with the SOU Teacher Education Council and integrated in program design and delivery refinements. A required summary of the program assessment is provided annually to TSPC. Examples of program refinements include standardizing and modifying and streamlining aspects of the teacher work sample, adding a part-time MAT option to extend access to more teacher candidates, and developing the undergraduate early childhood licensure program.

Faculty members typically hold a doctoral degree, and they hold or are eligible for licensure in Oregon, a requirement of TSPC for faculty members preparing candidates for licensure. Faculty load is adjusted for activities such as grant administration, program coordination, field-based student supervision, and scholarly work. Examples of scholarly work included textbooks, chapters in texts, journal articles, and conference presentations, often completed in collaboration with School of Education colleagues. Faculty members are strongly committed to service to and partnerships with the P-12 professional community, and they are active in service to the university. Scholarly activity is supported in the school, but there is limited university infrastructure for graduate education and grants and contracts institutionally.

The School of Education is located in the Education/Psychology Building. Offices, classroom, and meeting spaces are available for faculty. Faculty members are provided with current technology, and most faculty members have both desktop and laptop computers. The School is transitioning from V-Tel to PolyCom technology for distance instruction. Instructional resources are available for faculty through the Hannon Library including a children's literature section developed using gifts funds.

## **THE SCHOOL OF BUSINESS**

The mission of the School of Business to prepare students for challenging socially responsible careers in a dynamic, globally competitive business environment appears to support SOU's mission. The School achieves this mission with an emphasis upon excellent teaching, expectation of scholarship in journal and academic textbook contributions, individualized advising, and flexible course scheduling. The School benefits from collaborative partnerships with regional corporations and employers. Program elements have been developed which the School believes are essential to business success including globalization, ethical conduct, and technological competency that appear to support university goals. Accreditation by an external, national business accrediting agency is being considered.

The School is structured to deliver educational opportunities to a variety of stakeholders through residential, degree completion, and online formats. Baccalaureate degrees are served by an experienced chair and offered through five academic majors: Accounting, Management, Marketing, Small Business Management, Hospitality and Tourism Management, with several interdisciplinary, co-major degree options. Two professional graduate degrees, the new MBA designed to serve business, and Master in Management designed to serve other organizations are offered. Several certificate programs allow students to acquire specialized expertise to differentiate themselves in the market, each served by department coordinators. Programs are well supported by advising, information technology, and computer labs. Consistent with General Education learning outcomes, the School emphasizes communication skills, internship experiences, and a broad variety of academic offerings. Courses are offered in a variety of formats: on campus, satellite campus and degree completion to meet varied needs for educational accessibility. Graduate programs are supported by directors who provide academic and career advising germane to each discipline, and work to facilitate relationships between students, faculty and community organizations.

Program learning outcomes are well defined in the SOU Catalog, and have been informed by a variety of stakeholders including faculty, students, and industry. The curriculum has been mapped to Skill, Dispositional, and Learning outcomes and all outcomes have been allocated to various courses. Outcomes are assessed through mid-course exams, a capstone course, integrative projects, and exit satisfaction surveys. Business policies and procedures are reviewed with responsibilities assigned for evaluation in an annual faculty retreat. School leadership recognizes that a formalized, systematic cycle of assessment is not well-developed and needs to be strengthened. The last full, formal review of the School of business program was conducted in the late 1990s, although several certificate and course changes have occurred.

Business faculty hold professional and terminal degrees which are appropriate for the discipline being taught, with significant, yet balanced, teaching and professional industry experience levels. Faculty show strong commitment to students and to their School, as recently evidenced by the development of the new MBA through volunteer efforts. Each faculty member submits a Professional Development Plan annually to the Dean that outlines teaching, scholarship and service goals, with annual reporting on goal achievement. Faculty instruction is evaluated through post-course student evaluations, three year peer observations, and pre-tenure processes. Classroom evaluation of adjunct faculty is not formalized and needs improvement.

Students appear to be quite satisfied with faculty qualifications, support and advising. Undergraduate and graduate students believe in the value their education and feel that it is instrumental in helping them to pursue their career interests. The School has received an endowment for equipment that has allowed the development of significant technological resources and a computer lab.

As a result of collaborations with Rogue Community College, bond funding, state grants, and a successful fundraising campaign, SOU has partnered in construction of a 68,700 combined community and university facility in Medford. Additional resources may be required for staffing, faculty and support needs of this new facility. A recent \$100,000 Economic Development Agency grant has allowed a Cluster Study of projected enrollment trends and educational needs in Jackson and Josephine Counties which has helped to shape the School of Business offerings in Medford and plans for the future.

## **THE GRADUATE PROGRAM**

SOU offers graduate education at the master's level, with post baccalaureate requirements and course offerings clearly stated in the catalog. Master's programs are designed to prepare students for both research-oriented and professionally-oriented degrees. SOU requires that graduate programs support the institutional goals of regional service and liberal education. The Oregon State Board of Higher Education reviews and approves all graduate programs.

Programs of study at the graduate level are guided by faculty-developed learning outcomes. A Graduate Studies Committee (GHS) is charged with responsibility for oversight of graduate programs, faculty appointments, and assessment. Evidence of assessment of learning outcomes was provided by faculty operating within individual disciplines. Some programs, such as the MHC had performed self studies and received accreditation through external, national accrediting agencies. An emphasis on learning outcomes and assessment at the graduate level has been constrained by limited financial resources. However, little evidence of systematic and formalized program assessment, evaluation and improvement was found, outside of that provided through external processes such as the MHC external accreditation.

At SOU, graduate-level program design and operation are managed under the auspices of the Graduate Council (GC), as authorized by the university's Faculty Senate. The GC's duties include approving all new and revised and/or reinstated graduate courses and programs; publishing the policies of the Graduate Studies Program; establishing and reviewing the qualifications of the graduate faculty; and reviewing and overseeing the overall program of

graduate studies at SOU. The GC also establishes fundamental policies in the following areas: general graduate admission and exit requirements; students' rights and responsibilities; program regulations and procedures; and quality controls such as course exclusions. All departments and units that have begun graduate programs approved by the GC have presented convincing arguments, projections, and evidence as to the adequacy and diversity of their faculty resources to meet the demands of instruction, advising, scholarly or creative activity, planning, development, and evaluation of the graduate programs. However, there is a lack of infrastructure to support graduate education systematically and limited resources to support external funding initiatives.

At SOU, all full-time faculty members with the academic rank of professor, associate professor, assistant professor, or instructor, who have a terminal degree or the equivalent in their discipline and have demonstrated a continuing commitment to scholarship and professional growth are eligible for nomination to the graduate faculty. The department chair nominates the faculty member for graduate faculty with final approval of the recommendation by the college/school dean. The GC reviews all recommendations and then recommends and presents to the Faculty Senate for ratification the names of faculty members nominated to the graduate faculty.

### **Concern**

A formalized system of program assessment does not appear to be consistently developed and implemented across all graduate education areas. (Std. 2.B – Educational Program Planning and Assessment, Policy 2.2 – Educational Assessment)

## **Policy 2.1**

### **General Education/Related Instruction Requirements**

The General Education curriculum instituted in the fall of 2000 is being replaced by a new University Studies curriculum guided by principles approved by the faculty. Currently, SOU is offering both curricula and intends to phase out the General Education curriculum as applicable students graduate. The University Studies (US) curriculum was guided by Oregon State requirements for defined learning outcomes and student achievement, was informed through site visits to Portland State University, and was implemented in 2005. The US mission appears to support the SOU mission of “*expanding students horizons and helping them comprehend a diverse and changing world*” through emphasis upon critical thinking, communication, literacy, social responsibility and ethics, and adaptability with traditional humanities, sciences, and literature exposure. US learning outcomes, called ‘Strands’, and requirements are stated in the catalog and include Foundational (e.g., communication, critical thinking, information literacy, reasoning), Exploration (e.g., humanities, social science, science) and Integration (e.g., science/technology and society, citizenship, and diversity).

A Curriculum Realignment Action Committee (CREAC) with representatives from academic disciplines created the US design, with Faculty Senate approval, for student learning outcomes to be assessed in the first, second and final terms of US. The Foundational strand was selected by faculty as first priority for assessment and evaluation, with Exploration and Integration assessment following in the future. First year assessment of 800 students for Foundational strands was completed in University Seminar (USEM) classes through the Center for Teaching Learning and Assessment in 2005, and the rubric was refined after faculty review. A diagnostic writing essay and faculty refined grading rubric was used in 2006 to generate baseline data for Foundational outcomes. Analysis and evaluation of these assessment outcomes was accomplished with US faculty and Senate review, with recommendations for improvement through curricular and pedagogical training. A sample of 350 students is designed to be collected in the US 3<sup>rd</sup> year for longitudinal study of outcomes. Templates have been designed for assessment of Exploration and Integration outcomes, but have yet to be implemented in the disciplines.

Faculty are qualified and assigned to teach US and USEM areas by the disciplines. US and USEM faculty, and university leadership, have successfully collaborated in managing the transition from past General Education courses and programming to the new US program. The Center for Teaching, Learning and Assessment has supported the difficult transition to the US paradigm and Strands by providing US and USEM faculty with pedagogical and methodological resources and training for ongoing assessment, analysis, and enhancement of US and USEM. USEM faculty have as their first priority the work on Foundational learning outcomes and appear to work in a highly collaborative, cohort based fashion with ample opportunities for shared learning and pedagogical growth. Currently, department chairs and program coordinators in the disciplines appear to understand USEM assessment and goals well, but further communication and participation appears to be needed for US outcomes of Exploration and Integration. There appears to be a less-than-optimum degree of support, influence, and advocacy of US interests in the areas of learning outcomes, curriculum development and assessment.

US requirements for admission, articulation and transfer are presented in the catalog, and the ACCESS website. Four NACADA trained advisors assist students in both new and transfer degree programs through the ACCESS advising center. Students appear to be appropriately aware of learning outcomes for communication, critical thinking, reasoning, and writing skills, and how these relate to the majors. Facilities appear to be adequate to deliver the educational program.

## **Policy 2.2**

### **Educational Assessment**

Educational assessment at Southern Oregon University appears to have been negatively impacted by the institution's leadership changes and fiscal instability in recent years. Progress in identifying educational goals and assessment of outcomes has been limited, in part, due to these issues. The suspension of a promising external review of programs in 2001 has resulted in the lack of systematic processes for evaluating academic departments and programs. Information collected in those early program reviews might have been useful in establishing baselines in student achievement and forming the basis of succeeding assessments. Most internal program reviews were not continued. With the exception of University Seminar, few, if any, of the current approaches toward program review incorporate a comprehensive review of curricular design, implementation, evaluation, and curricular maintenance. Furthermore, since 2003 the university has been without a dedicated institutional research position, resulting in the responsibility for conducting various surveys and reports to the initiative of individual departments.

Although the SOU self study documents the limitations of current educational assessment, a substantial degree of assessment has occurred through recent years. Assessment in capstone courses, 300-level writing and research courses in most majors, and some entrance level measurements were established during the last decade. However, with a new understanding of educational assessment, departments and programs have re-evaluated the ways they were using these instruments and nearly all have concluded they were not good measures. The experience of the Communication Department is typical. Student capstone projects had been evaluated according to specific outcomes, but the process involved only the capstone instructor. Data from quarter to quarter, while based on the same criteria, were not standardized and after several years of collecting information, the department decided it was not worth a serious attempt at analysis. They are now embarked on a new process which they are designing to provide standardized, reliable data. Many other departments on campus reported having many years of information on capstone courses and other evaluation instruments, but it appears that analyses of these data are not consistently performed.

The activities currently under way regarding the development of learning outcomes for programs are not the first stages of an educational assessment program but are the beginnings of a revised program. With the leadership of the University Assessment Committee and the work done in evaluating the University Seminar, models for other programs are being developed, and departmental progress is being tracked through various means, including the newly developed "snapshots" of departments that track progress in program evaluation.

The progress of individual departments and schools is currently quite uneven. The School of Education, for example, has in place what is likely the most robust educational assessment program at SOU. Responding to Oregon standards for licensing of teachers, the School has well defined proficiencies, records of student achievement, and evidence of use of outcomes data to improve teaching and learning. In graduate education, however, little evidence exists to

demonstrate that educational assessment activities are occurring. At present, it appears that the Graduate Council has not articulated either a set of graduate proficiencies that should be present or developed in graduate studies programs, nor has it developed a review procedure or schedule of periodic reporting of individual program results to the council by graduate program coordinators.

Some individual departments, such as Chemistry and Biology, make use of major field tests as well as mid-term evaluations to track student progress and there is some evidence of using this information in program revision. In the Performing Arts, regular juries and performance evaluations have been conducted for several years, and the department intends to find ways to record student outcomes for comparison and evaluation longitudinally.

It appears that there is an opportunity for Southern Oregon University to maintain the momentum occasioned by this self study process in the area of educational assessment. With support and leadership from academic administration, the university is positioned to develop and implement educational assessment plans and begin to complete the assessment loop by using information collected to improve curricula, teaching, and student learning.

### **Recommendation**

It is recommended that SOU develop and implement comprehensive educational assessment plans and ensure that assessment results are used to improve teaching and learning. (Std. 2.B – Educational Program Planning and Assessment, Policy 2.2 – Educational Assessment)

## **Policy 2.6**

### **Distance Delivery of Courses, Certificate, and Degree Programs**

Although the mission statement of Southern Oregon University does not mention continuing and distance education (hereafter CDE) it does describe its role as "... *a vital partner in the healthy development of its region and state in association with civic, national, and international engagements.*" Multiple sources suggest that SOU is 'searching for identity' and as SOU seeks to define its overall mission and goals, so does CDE seek to clarify its own place and mission within the evolving mission of the university. It appears that CDE has a clearly defined purpose congruent with institutional mission, but additional alignment is anticipated once the institutional mission is more clearly defined.

The CDE efforts of the university are, as the university is itself, in a state of transition and definition. The outreach efforts of SOU are administered by Extended Campus Programs (ECP); a branch campus located in Medford, OR; and most recently by academic departments delivering distance learning courses themselves using the Blackboard learning management system. These transitions have, in part, resulted in the elimination of the executive position (associate provost for Extended Programs) that has provided leadership to CDE and resulted in the appointment of interim directors at both ECP and Medford Campus.

#### **Extended Campus Programs**

Some of the Extended Campus Programs have recently been mainstreamed into those academic departments that most align with their function, e.g., Medford Campus reports to School of Business, Summer Sessions to the College of Art and Sciences, Human Service Degree Department to Psychology Department, Human Communications Degree Completion to Communication Department, etc. At the time of this site visit, four of the original seven areas constitute ECP: Pre-college/youth programs; Siskiyou Center Programs; Distance Learning Programs; and Other Credit; i.e., Ashland Credit, etc.

#### **Distance Learning and Ashland Credit**

The distance learning efforts of SOU came into existence in the early 1990's as part of a centralized initiative. These efforts are now at a critical crossroads and are in transition. The issues include the desired degree of growth of this self-support program and the extent of centralization of this program. Resolution of those issues will impact other areas such as training of faculty and efficiency and consistency of program delivery. A significant personnel decision is the possible replacement of the interim director.

The Distance Learning department has served SOU well to this point. It has pioneered online and distance learning at the university through a time of tremendous technological change and progress. The Memorandum of Understanding (MOU) that faculty sign whenever they undertake the development of a course to be offered over the Blackboard course management system reflects thoughtful consideration of the important issues that affect the distance-education faculty and student alike. For example, the MOU makes clear that the university retains ownership of

online courses developed by faculty as “work for hire,” that faculty are expected to revise the course every three years and not use copyrighted material from third parties without permission, and that faculty and departments will be appropriately compensated for their efforts. Furthermore, in the literature sent to prospective students an “online readiness self-assessment” is provided to assist students in their determination of whether distance learning fits their learning style and circumstance—a best practice that is not used enough to inform students of the risks associated with independent learning. The literature also includes an overview of some rules for appropriate communication using e-mail (aka “Netiquette”) and helpful suggestions to ensure a student’s success, including use of virtual and physical library resources.

Some of the challenges facing distance learning in the future include (1) a clear and engaging mission statement; (2) the inclusion of distance learning in the strategic planning of the university; (3) the hiring of a new director and instructional designer with distance learning expertise; (4) better and more complete student services for the distance learner; (5) better and more complete faculty training, including the dissemination of course development standards to all involved; (6) more complete and consistent review of course quality, including peer review; (7) the communication of university materials tailored to distance learning students; (8) uniformity and equity of student fees and tuition rates; and (9) additional program and pedagogical interventions, e.g., proctored examinations and signed commitments by students, to protect the academic integrity of student work and the credibility of the degrees it awards.

The Ashland Credit program, also self-supporting, has successfully provided a number of elective courses for SOU students on the campus that may not be otherwise available to them as part of their university experience during the afternoon or evening hours. The program likely offers the only for-credit series of Chinese Medicine courses in the United States, among many others including Yoga, Judo, Storytelling, and Art Therapy. Some Continuing Education Units (CEUs) are issued each year in accordance with industry standards and records of the same are properly kept for future retrieval.

### **Pre-College/Youth Programs and Siskiyou Center Programs**

All youth and older-adult programs administered by ECP are self-supporting with no subsidy made from the general fund. The older-adult programs have maintained enrollments of approximately 2300 and the youth programs of about 2900 over the past three years. The programs are administered by experienced and competent professionals who know well their work, the audiences they serve, and the university they represent. Records are properly kept and no CEU’s are administered for these specific programs. The quality of instruction is high as measured by the end-of-experience evaluation instruments and, even more importantly, by the demand for programs from year to year. Three SOU faculty serve on the advisory board for the youth programs and retired faculty are involved with some of the older adult programs, including the internationally-acclaimed Elderhostel program, Senior Ventures, and the Osher Lifelong Learning Institute (OLLI). Furthermore, the interest SOU has shown in its retirees and the SOU Retirees Council by giving it administrative support through ECP is noteworthy.

## **Medford Campus**

The Medford campus has been an important part of SOU since 1984. The leased building will be replaced by Fall 2008 with the new three-story building presently under construction. This 22 million dollar facility will jointly service Medford campus and the Rogue Community College and increase available space for Medford Campus by approximately 25 percent. This building was not funded with general fund monies although the operation of the Medford campus will continue to be financed from the general fund unlike the other CDE programs. The cluster study and strategic analysis completed on behalf of this expansion suggests it will contribute substantially to the overall student enrollment growth at SOU. Not all faculty and administrators at SOU share in the vision of the importance of this facility and remote campus, especially because this facility is being constructed ahead of other capital improvement needs at the Ashland campus. However, the recent successes of another joint partnership between Oregon State University and its local community college in increasing enrollments has helped reassure those involved that this partnership will likely do the same, especially at a time of declining enrollments at Ashland. The greater SOU university community would benefit from further discussion about, and understanding of, the role that Medford promises to have in supporting the institutional mission and sustaining enrollment levels.

Many of the students' concerns about inadequate services in the current facility will likely be eliminated or mitigated by the new facility and joint partnership with RCC. Some of the current concerns of students (and faculty alike) about the current facility include inadequate learning conditions caused by non-ergonomic chairs and problems with heating and air conditioning. The students also anticipate the convenience of an on-site bookstore, copy center, a state-of-the-art technological infrastructure, and additional advisement and counseling services that they do not have access to now without traveling to Ashland.

Two senior administrators at SOU-Ashland have identified a need to maintain closer involvement with, and oversight of, those faculty and programs delivered at Medford campus. There appears to be minimal evaluation of Medford-based faculty by appropriate Ashland personnel. In particular, the adjunct faculty appear to have had little involvement with their academic departments following their hire. Evidence suggests that there is some frustration with the timely appointment of faculty to teach courses in Medford. There also persists some sense of competition for students and resources among the two campuses.

## **Policy A-6**

### **Contractual Relationships with Organizations Not Regionally Accredited**

All contractual relationships with organizations *not regionally accredited* were reviewed. Although some of the organizations that SOU has entered into contractual relationship with had received specialized accreditation, none of them had been regionally accredited. This policy requires that when SOU enters into a contractual relationship with organizations not regionally accredited, e.g., American Band College and ELS (English as Second Language Program), that they retain *sole and direct control of the appointments and validation of the credentials of faculty and the evaluation of student progress*. There is evidence that SOU “sole and direct control” has not been consistently exercised in all cases with their contracted educational vendors and off-campus faculty. The retention of “sole and direct control” by SOU in all circumstances will help the institution retain its integrity and the quality of instruction that students will expect from any SOU-sponsored learning experience—credit and non-credit alike.

## **Standard Three Students**

### **Purpose and Organization**

Like other units at SOU, the Division of Student Affairs has undergone major transitions over the past three years. They have developed a new mission statement through an inclusive process. Divisional leaders have grounded their planning conversations in the results of SOU students' responses to assessment efforts including the National Survey of Student Engagement, the National College Health Assessment, the CIRP First Year Student Survey, and institutional retention data and student characteristics. The self-assessment and staff comments provided examples of changes made as a result of assessment.

Upon review of the self-study, supporting documentation, and campus interviews, it appears that the Division of Student Affairs is organized to support the university's mission and goals. The Division provides supportive services and engaging programs for students outside the classroom. Support services are available for students and are designed to support the institutional mission and goals. The vice president has worked closely with the divisional leadership team to share student data and budget information and to create a sense of shared responsibility and mission. Physical space is generally good; recent remodels of the union and the health and wellness center have addressed some space issues. A remodel of Britt hall, where enrollment services is located, is underway.

A review of the credentials of Student Affairs staff reveals a professional staff that is balanced in terms of experience and academic preparation. There are 69 professionals several of whom possess more than 20 years experience in student affairs; 16 staff members have terminal degrees. Recent planning in response to the retrenchment plan has resulted in consolidation of responsibilities in some areas such as enrollment services as well as the opportunity to hire some new individuals in professional roles. Many in divisional leadership roles have been there fewer than five years. The self-study acknowledges that evaluation of personnel has been intermittent in recent years.

SOU has created a framework for a five-year strategic plan for the division, and departments are in the process of creating five-year plans. Divisional discussions are informed by literature on student engagement, retention, and satisfaction. The organization provides an array of services and programs designed to support student learning, student development, and academic success. As a result, the VP believes the division is well poised to make decisions about resource allocation that focus on student needs. While cuts have been made from the operating budget and personnel, it is likely that the organization is stronger and more focused as a result of the retrenchment process. From those discussions came a renewed focus on recruitment and retention as well as early stage planning for a learning center concept. The institution recently received \$750K from the State and Board for the biennium for recruitment and retention efforts.

The division has responsibility for several auxiliary enterprises including the union, athletics, and housing. Some functions are funded by student fees; it appeared in conversations with several

administrators that the current method of distribution of those fees (completed annually) makes it more difficult to engage in long-range planning particularly in a time of budget reductions.

### **General Responsibilities**

SOU students' average age is 27; many are balancing work and family obligations with their responsibilities as a student. Student Affairs staff members appear to be aware of and sensitive to the nature of the students at the university. Students and administrators provided specific examples of ways students are involved in institutional governance.

Policies related to students' rights and responsibilities are available in a variety of fora (i.e. catalog, handbook, websites); the procedures for violations of academic and/or behavioral standards are clear.

Campus crime statistics for three years are published on the website for the campus public safety department; however, the copy on the web was outdated. One of the co-directors of the department reported that he had submitted this year's report as required by law and stated that he thought it was possible that this year's statistics were not yet posted on the website. The co-director reported that the data were shared in the form of a public safety brochure with all students, faculty, and staff as required by federal law. Required information about accessing information relative to registered sex offenders was not available on the website except in the text of the PDF file of last year's public safety brochure. The crime statistics reveal a campus that is dealing with issues dealt with on a large number of campuses (alcohol violations, drug violations, burglaries).

The catalog makes available a broad array of information including mission, admission requirements, student rights and responsibilities, academic policies, degree requirements, course descriptions, tuition and fees, refund policy, and other academic procedures and practices. They distribute a handbook planner that also includes information on student conduct, grievance procedures, academic integrity, student organizations, and various student services.

### **Academic Credit and Records**

Admissions, registration, financial aid, recruitment, and network support report to a newly created Dean of Enrollment Management. Recently consolidated, the area is still working to create and/or streamline processes and practices to better serve students.

Policies about degree and non-degree credit are established. Transfer credit policies are established. Student records are secured in an area with a lockable door and a security system at night. Records on the Banner student information system are backed up nightly by the Oregon University System; other records are on microfiche and CD and stored off-site.

### **Student Services**

The institution's admission policies are consistent with its mission. Policies regarding satisfactory academic progress, suspension, and expulsion are in place and publicized. Policies

for admission by alternate criteria are established and adhered to. Graduation requirements are clearly stated.

Financial aid is available through scholarships and grants and is centrally managed and supportive of students' academic goals. However, there is a need for additional resources to support a student body with a large proportion of first-generation and/or Pell-eligible students. Information about financial assistance is available on the financial aid website, the SOU Foundation website, in publications, and through presentations.

The institution provides orientation and advising for students. First time students are required to meet with an advisor and to create a plan of action for registration. University seminar instructors serve as first-year advisors to the individuals in their seminar section(s). ACCESS Center advisors evaluate transfer courses, advise new students and undeclared students. They are trained in developmental advising. Faculty serve as major advisors.

Student services are available to support students with career decisions, psychological issues, health care needs, learning accommodations, residential living, and academic decisions. Programming exists that is designed to support civic engagement and study abroad. New student orientation is designed to support students in their transition to, and engagement with, the university. The Student Union staff works with student leaders and student affairs staff to provide programs and activities that are strongly related to student engagement, student development, and student satisfaction.

Interaction with many students indicated that students felt welcome and supported by the university. Student leaders indicated that they felt they were informed about and consulted in the recent retrenchment planning.

Resource centers in the Student Union appeared to be welcoming and well-used spaces. The Commuter Resource Center, the Multicultural Student Center, the Queer Resource Center, and the Women's Center provide activities that meet the needs of their specific populations. Assessment of these programs and services has been developed.

Residential Education and Services is a self-supporting organization. With the exception of one residence hall, all were built more than 40 years ago. Family housing is provided in a set of facilities that are more than 15 years old; that facility is full with a waiting list. They have additional inventory and are expanding their conference housing offerings as a result. The Vice President and the new AVP in this area are considering options for the more than 30 houses currently owned (and largely rented to students) by the university. The childcare center also has been added to the areas overseen by housing.

Food service is self-operated. Students commented about the variety of venues available to them; there are seven different food outlets scattered throughout the campus.

The athletic director manages a shared facility that houses academic classes, campus recreation, intramurals, and athletics. Purchase of new equipment for the weight and cardio rooms are planned; the athletic director expects more general students to use the facility.

The campus bookstore is university operated. There exists a bookstore advisory committee that includes students, faculty, and staff. Oregon University System audits periodically are conducted. The store consistently returns profits to the university.

A campus newspaper and a literary magazine are published by students. The two publications and the campus radio station, which broadcasts over the internet, have space in the Student Union. There is a student publications advisory committee in place. The relationship of the university to its publications and media needs to be more clearly defined and published.

### **Intercollegiate Athletics**

Southern Oregon University participates in the NAIA; and is a member of the Cascade Athletic Conference. Approximately 300 student athletes participate in 12 sports (7 women and 5 men). The athletic director reports to the vice president for student affairs, and the president has the ultimate authority for the program. The Faculty Athletic Representative functions to provide institutional oversight and departmental guidance.

Prospective student athletes are subject to the same admission policies and procedures as the remaining student body. In addition, NAIA standards for athletic eligibility are more stringent than those set forth by the university. An eleven-step process for verifying eligibility includes a review by coaches, registrar, FAR, and the athletic director.

The department has not yet achieved proportionality in participation by gender; females make up 58% of the student body but 38% of the student athletes. Financial assistance to athletes is proportionate in compliance with federal regulations. Benefits and opportunities are provided equitably. The self-study outlines some initiatives the department will undertake to determine and plan for participation interest.

The department, like several other services, is dependent upon student fees for its operations. Because these fees are allocated on a year-to-year basis, this situation may result in inconsistencies and impact negatively the ability to plan long-term. The athletic booster club generates approximately 76% of the athletic scholarship funds.

Of note, the student athlete retention and graduation rates are significantly higher than those of the general student body.

The department funds are audited internally and through the Oregon University System Internal Audit Division. They received a number of recommendations in a 2005 audit that resulted in creating two new fiscal analyst positions and the revision of processes and procedures.

Neither the conference nor the university has a written policy on scheduling conflicts and because SOU is on a quarter system, coaches and administrators must be particularly diligent in this regard. The department is considering working with others to develop an institutional policy in this regard.

### **Policy 3.1**

## **Institutional Advertising, Student Recruitment, and Representation of Accredited Status**

Advertisements and materials observed focused on educational programs and services. Information was clear and current.

The general catalog for Southern Oregon University is made available for purchase at the bookstore and on the university's website. It contains a disclaimer that makes students aware that the printed catalog may not be the most up-to-date information. The catalog is well indexed, and it was easy to find the information required in Policy 3.1.

With the exception of information about faculty degrees and facilities, the catalog clearly depicts the issues outlined in Policy 3.1, including information about the institutional mission and goals, admission, residency, courses, degree requirements, faculty, rules, tuition and fees, financial aid, and policies for refunds and withdrawals.

The catalog provides clear information regarding requirements for eligibility for licensure and lists specifically the organization by which programs are accredited.

Recruitment efforts are conducted by professional recruiters and faculty volunteers, and these individuals provide accurate information regarding SOU and avoid misrepresentations and/or misleading assurances.

## **Standard Four Faculty**

### **Faculty Selection, Evaluation, Rules, Welfare, and Development**

The SOU faculty have a long history of actively shared governance with the administration. The leadership of the Association of Professors: Southern Oregon University (AP:SOU) and the Faculty Senate are in agreement that the faculty play an important role in institutional governance. Several faculty committees perform particular functions related to the governance of the institution. The Curriculum Committee receives all proposals for curriculum development and review. The University Planning Committee is charged with advising the administration on matters of budget, facilities, and strategic planning. SOU faculty are also responsible for advising the majors in each of the degree programs offered at the institution. Faculty are highly committed to their students and to their work.

AP:SOU negotiates a biennial contract with the Oregon University System covering faculty compensation and working conditions. Full-time professorial faculty have a standard teaching load of 36 equated load units (ELUs) per year, adjusted for course size, field work and new preparations. It appears that the Retrenchment 2007 Plan has had the effect of causing faculty to view their workload as having increased which, in turn, has put a strain on the ability of the faculty to continue their scholarship, research and creative activity, and provide appropriate service on behalf of the institution.

Data show that SOU faculty salaries rank below the median in comparison with peer institutions. According to the Oregon University System, SOU ranks 11 of 13 for total compensation within their respective comparator institutions. Both the faculty and the administration are aware of the salary situation but are constrained by limited financial resources.

Despite the lower than average salaries, the retention of faculty at SOU is about 95% over an 11 year average which is very similar to the other institutions in state. The faculty at SOU are of high quality and extremely committed to the institution. They are optimistic about the future of the school with the new administration.

SOU has an orderly process for the recruitment and appointment of full-time faculty. This hiring process is collaborative, involving faculty, administration and monitored by Human Resources. When an open position is scheduled to be filled, the department chair is responsible for initiating the search for candidates. The department faculty selects a search committee, the position is advertised, applications are received and evaluated, and a list of acceptable candidates is submitted to the chair and dean. Institutional personnel policies and procedures are contained in the SOU Faculty Bylaws and in the AP:SOU Collective Bargaining Agreement.

Regular and systematic evaluation of faculty in order to ensure teaching effectiveness and the fulfillment of instructional and other faculty responsibilities is uneven at SOU. The departments follow the SOU Faculty Senate Constitution and Bylaws for evaluating all tenure track and tenured faculty. A September 2006 Memorandum of Understanding between the AP:SOU and

SOU identified a new category of faculty, Professional Faculty. An annual formal evaluation cycle for professional faculty has not been systematically implemented.

Bylaws of the Constitution of SOU Faculty clearly specify the requirements for evaluation and reappointment of faculty on various appointments. However, evaluation of temporary (adjunct) faculty appears to be very uneven across the campus. An annual formal evaluation cycle for (adjunct) temporary faculty also is not systematically implemented.

Faculty members are entrusted with broad individual academic freedom to pursue and teach topics according to best practices in their discipline. Academic freedom is protected for all SOU faculty under Oregon Administrative Rules. Additionally, faculty are entitled to freedom in the classroom as described in OAR language.

Each department or academic unit examines and validates the academic credentials of adjunct faculty hired to teach SOU courses within their discipline. Academic degrees, professional expertise, and experience of adjunct faculty are considered by departments as a means to help uphold academic standards in each course and department. Most adjunct faculty possess at least a master's degree and are supervised by an SOU faculty or the department chair. In Fall 2006, SOU developed an Adjunct Faculty Handbook which directs all departments to insure that each adjunct is assigned a departmental faculty mentor to monitor the adjunct's performance and serve as the adjunct's primary source of campus information. This new policy has not yet been fully adopted.

During the 2005-2006 academic year, the SOU Faculty Senate created the Faculty Roles, Rewards, and Responsibilities Task Force. Their charge was to include adjunct faculty in their considerations of faculty issues and to make appropriate recommendations to the administration. As a result of this report, SOU and the faculty union agreed to revise the 2005-2007 collective bargaining agreement in order to clarify the role of (adjunct) temporary faculty members at SOU.

### **Scholarship, Research, and Artistic Creation**

SOU faculty produce scholarship, research and artistic creation that is consistent with the mission of both the institution and the college/school. Examples of significant faculty work from every department were contained in an exhibit available to the reviewers. SOU particularly prides itself in the engagement of students in research through the senior capstone projects. These efforts have resulted in joint faculty-student publications and student speaking opportunities at conferences.

Information about institutional policies and procedures concerning scholarship, research and artistic creation is disseminated electronically, in print, and in live presentation. There are numerous resources available online and in print format to guide faculty through the Institutional Review Board process and to assist in obtaining external funding. New faculty learn about Grants Administration at fall orientation sessions.

Expectations relevant to hiring, promotion, and tenure are presented broadly in the Faculty Constitution and Bylaws. The process for faculty evaluations include a component involving

review of faculty scholarship, research and artistic creation with criteria that distinguish different ranks. It is the department chair's responsibility to provide a copy of the department personnel guidelines and Faculty Constitution and Bylaws at the time of faculty hire or soon thereafter.

SOU is dedicated to fostering an environment that promotes ethical research practice and academic integrity. Areas of compliance managed by Grants Administration are human subject protection and animal care. Both the Institutional Review Board and the Institutional Animal Care and Use Committee are registered and in compliance with their cognizant federal agencies – the U.S. Department of Health and human Services and the U.S. Department of Agriculture.

SOU's commitment to support faculty scholarship, research and artistic creation is evident in funding priorities and policy, space and equipment utilization, administrative infrastructure, and information resources. The AP:SOU Collective Bargaining Agreement articulates the general fund resources provided to support professional development activities. These resources are partially earmarked for curriculum development and partially for faculty activity in professional organizations.

The adequacy of physical resources to support scholarship, research and artistic creation varies greatly across the institution. For example, space for these activities appears to be adequate in the Language, Literature and Philosophy Department but not in the Performing Arts Department. Many of the science departments experience a shortage of adequate space for faculty research and a lack of funds to maintain or replace equipment used by faculty..

The Grants Administration (GA) Office provides support to departments in seeking external funding to support scholarship, research and artistic creation activities. The GA office facilitates pre-award functions and publicity, recognition, resource development, training and compliance. However, this function appears to be marginally support by the university.

Administrative support for scholarship, research and artistic creation comes in the form of the Business Office facilitating contract oversight and fiscal management once the faculty member obtains the external funding. Another significant resource supporting scholarship, research and artistic creation is the Hannon Library facilities and services available for faculty scholarship. The library has access to many scholarly information databases and librarians work directly with faculty to identify needs and to assist faculty members in the electronic search process.

## **Policy 4.1 Faculty Evaluation**

Southern Oregon University has a comprehensive system of evaluation for full-time faculty that is regular and systematic. The review processes provide the opportunity for faculty to work with the department chair in the development of annual plans and in the annual evaluation of performance. Additionally, a peer review is conducted periodically and shared with the faculty member. The annual evaluation includes teaching, scholarly and creative works, and service activities, and faculty provide multiple forms of information for each category including student evaluations of teaching.

The policies and processes for faculty annual review, tenure, and promotion are governed by the Collective Bargaining Agreement and the Faculty Constitution and Bylaws. Faculty members submit a self-assessment using the Faculty Professional Activity Plan for the ensuing academic year and complete the Faculty Professional Activity Report at the end of the academic year. The department chair conferences with the faculty member on the plan and report, and the information is integrated into the annual evaluation.

The process provides for annual evaluation of faculty by the department chair in consultation with the Department Personnel Committee once a year for faculty on fixed term appointments (pre-tenure tenure track and faculty with three-year rolling contracts). Peer evaluation (called Colleague Evaluation) occurs in the fifth year of employment, followed by interim evaluation (post-tenure) in three years and a Colleague Evaluation in the third year after the interim evaluation. Review for tenure and promotion occurs in the sixth year and may occur as early as the fifth year. The School Personnel Committee and dean of the unit review tenure and promotion decisions, and the Faculty Personnel Committee and Vice President and Provost recommend to the President.

Temporary (adjunct) and professional faculty are employed to support the delivery of the academic programs. The SOU Adjunct Faculty Handbook (published August 1, 2006) states that *“After an adjunct instructor has established a pattern of excellence in teaching, the formal evaluation cycle will occur at least once a year; faculty supervisors have the discretion to conduct more frequent evaluations.”* A Memorandum of Understanding (MOU) signed in September, 2006 included a new faculty rank, professional faculty. These term faculty members are also appointed for a specified term and are to be evaluated annually according to the MOU.

There is no established system of annual evaluation for temporary faculty and the newly created category of professional faculty that ensures that all temporary faculty members are reviewed annually. The lack of an evaluation system for these faculty members limits the ability of Southern Oregon University to help ensure that students receive a quality educational experience and that temporary faculty members have access to professional development to improve their performance.

### **Recommendation**

It is recommended that SOU implement a formal annual evaluation cycle for temporary (adjunct) and professional faculty to provide regular and systematic information on faculty performance to ensure the effectiveness and quality of all faculty responsible for the academic program. (Policy 4.1 – Faculty Evaluation, Std. 4.A.5)

## **Standard Five**

### **Library and Information Resources**

Southern Oregon University (SOU), an undergraduate-focused liberal arts college and a regional comprehensive university, is challenged to meet its stated mission due to declining enrollments and subsequent diminished external funding support. The internal organizations responsible for fulfilling the obligations delineated in *Standard 5 – Library and Information Resources*, namely Hannon Library and the Information Technology Departments and their sub-units, are acutely aware of their mission, responsibilities, challenges and limitations as expressed in their self-studies and additional documentation.

The staff in these units are to be commended for their commitment to SOU, to its students, faculty and staff. Their efforts to maintain and improve services during these times of diminishing resources while focusing on their core missions is evident throughout the literature.

Hannon Library's core collections, resources and services are progressive and consistent with the nature of SOU's changing mission. The Information Technology Department (ITD), composed of Computing Services, Telecommunications and Media Services, demonstrates a history of growth determined by the nature of the institution's programs congruent with available technology and funding. The nature and extent of these departments' programs are severely impacted by the budget problems currently facing SOU.

The Library's and the ITD's policies, programs, activities and planning are informed by appropriate survey feedback, consultation and advice from various advisory councils. Information resources from all over the world are available via external computer and information networks and formal partnerships. Planning is focused on contributing to the development of students, faculty and staff to use resources independently with appropriate consultation when necessary. Replacement and maintenance of core equipment, except for student funded open labs, appears to be jeopardized during this period of retrenchment.

Recently remodeled and renovated, Hannon Library is the cultural center of the campus. Electronic library resources are available on and off-campus through an extensive computer network. Adaptive technology workstations are available for use in the library and open computer labs. SOU's cooperative, formal arrangement with Orbis Cascade Alliance, a two-state alliance of private and public academic libraries, enhances local and regional information holdings and access. ITD's formal relationships with external bodies, such as Intelcom and the Oregon State University, enhance and inform local technology offerings. Electronic library holdings are available to off-campus students.

Library personnel are properly credentialed, trained and organized to effectively provide library and information programs to SOU. ITD's personnel are properly credentialed, trained and organized to effectively fulfill their mission to SOU. Many students receive professional experience through their part-time working responsibilities with Hannon Library and ITD. ITD's historic, systemic, dual-based salary schedule remains a barrier to effective personnel administration and to high employee morale. Professional growth opportunities for library and

technology faculty and staff are diminished while the pace of technology change increases. The loss of personnel in both organizations has diminished their ability to assist users with their learning projects. ITD internal analysis suggests that expenses will likely soon exceed revenues, deplete reserves, and position ITD such that it will be problematic to keep pace with needed technological change. The percentage of university budget dedicated to library and information resources continues to decrease. Financial resources declined 30 percent for Hannon Library and 35 percent for ITD in the past seven years. The number of monographs (books) purchased by Hannon Library in the past year has decreased substantially due to budget restrictions.

There are appropriate opportunities for campus-wide input into the planning of library and information programs. There are appropriate linkages between Hannon Library and ITD personnel and programs across campus. Hannon Library surveyed users in 2006 using LibQual+, a quality standard library assessment tool. Continuous use of those and other data gathered by librarians informs program planning. Strategic, systematic technology reviews/surveys by ITD with resulting concomitant university-wide policies, resources and programs remain to be completed.

Given its present financial status, Southern Oregon University is appropriately planning its future in the areas of library and information technology services. The staff of both units are challenged to provide continuously updated services in a rapidly changing environment where fiscal resources are at a minimum, while the demand for and pace of information and technology services continues to escalate.

The professionals staffing these important areas are acutely aware of and have delineated their missions, foci, resource bases and challenges. Immediate tactical planning, with broad internal consultation occurred to determine appropriate use of available resources. Hannon Library's strategic planning efforts will benefit from formal review of Libqual+ data and the arrival of a new dean. For ITD long-range strategic planning awaits guidance and input from the central planning efforts and a new organizational structure to come from the administration.

### **Concern**

An enterprise that is integral to the mission of the organization cannot sustain long-term stress without impacting the overall quality of its outputs. Quality library and technical services are central to the academic enterprise. The Library and ITD staff have plans in place to reduce spending and concomitant services. However, they will continue to operate based upon conservative estimates of available resources with the goal of developing programmatic strategic plans in the near future. (Std. 5.B – Information Resources and Services)

## **Standard Six Governance and Administration**

The system of governance at Southern Oregon University is determined by Oregon law and policy. That system is established and described in statutory law in which SOU is governed by the Oregon State Board of Higher Education. The State Board operates through a chancellor, who oversees the activities of each Oregon University System institution through a regular reporting process. The State Board delegates authority to operate SOU to the university president who is the chief executive officer of the institution. Authority, responsibilities and relationships among and between all these individuals and entities are well-defined and understood. These facets of governance were effectively demonstrated in the development and implementation of the Retrenchment 2007 Plan. System policies, where applicable, are appropriately administered at Southern Oregon University.

The Board has a well-established organizational structure and operating procedures. It evaluates the president of SOU on a regular basis. A key element in this evaluation process is the extent to which SOU is progressing in meeting performance indicators established for SOU in conjunction with the Board. This focus on accountability remains a significant direction of the Board, and performance-based funding will likely continue for the future. The Board effectively fulfills its responsibilities to Southern Oregon University.

As SOU attempts to re-define its mission, a likely significant issue is the role of the State Board in this process. The Board has general powers to assign missions and roles for the institutions under its jurisdiction as described in Oregon Revised Statutes. Given the present lack of clarity of SOU's current mission, it will be critical that a reasonable consensus is developed among all constituencies regarding the establishment of a formalized new mission statement and goals.

Institutional leadership is appropriately organized to support achievement of SOU's mission and goals. The dominant issue with respect to leadership and management continues to be the turnover in senior leadership positions within the institution in recent years. Additionally, budget reductions in some areas have resulted in unfilled leadership positions. A critical management issue will be the development of an effective administrative structure to support the goals of the graduate programs at SOU. The restructuring of the three schools into the single College of Arts and Sciences may impact the institution's ability to support the teaching and learning environment which results in the achievement of SOU's mission and goals. However, that impact will likely not be known for several years.

Institutional governance is a consultative process that significantly engages faculty, staff and students in university-level decision-making. Broadly-representative committees, councils, and task forces are effective mechanisms in providing review and advice at the institutional level. However, an ongoing challenge for the university is the expectation for substantive consultation and communication among faculty, staff, administrators and students as the systemic culture of the university evolves with a change in executive leadership and mission.

## **Standard Seven Finance**

### **Financial Planning**

Financial planning and budgeting at SOU is currently focused on the Retrenchment 2007 Plan that addresses the need to restore depleted reserve balances. The Retrenchment Plan encompasses reductions and reorganizations that span three years, through fiscal year 2010 when it is expected that adequate reserves will be established. The retrenchment process suspended a planned equipment replacement cycle for one year and limits facility maintenance services; therefore short and long range budgets should be monitored to plan for the management of revenue and expenditures as they relate to physical facilities and acquisition of equipment.

Budgeting processes are undergoing an overhaul to address problems identified in the Retrenchment Plan and to attain greater transparency across the institution. The financial planning and budgeting change is a collaborative effort of academic and administrative staff representing various disciplines which has led to a decentralized method of budget responsibility. The creation of a new budget model is occurring at an opportune time to be based upon the newly revised mission and goals of the institution, once finalized. While the new budgeting model is being developed, the current annual operating budget follows Oregon State Board of Higher Education (OSBHE) budget approval policies and reporting requirements.

### **Adequacy of Financial Resources**

Financial reports of SOU demonstrate revenue declines and expenditure increases consistently for the past five years as a result of declining enrollment, decreased state support, increased payroll and increased utility costs. Despite cost cutting efforts, consecutive years of operating losses have depleted financial reserves to an amount that is below the Oregon State Board of Higher Education (OSBHE) required 5% floor, thus prompting management to implement the Retrenchment 2007 Plan. Therefore, financial reserves are not adequate to meet fluctuations in operating revenue, expenses, and debt service.

SOU has adequate resources to meet debt service requirements of pledged revenue bonds for capital projects within auxiliary operations. However, the institution recognizes that operating surpluses generated from its auxiliary and designated operations are supplementing operating losses associated with education and general operations. The institution assesses an administrative overhead cost to the auxiliary and designated operations funds. This cost has steadily increased from 4% to its current rate of 7.75% of revenue. The institution will need to monitor the reserves of its auxiliary and designated operations to ensure adequate resources for future debt service requirements associated with pledged revenues.

### **Financial Management**

The president reviews the financial status of the institution quarterly with reports that are also submitted and reviewed at the Chancellor's office. The institution complies with all aspects of financial management, reporting and audit requirements as evidenced by audited financial statements and independent auditor's report and internal audit reports.

### **Fundraising and Development**

The SOU Foundation plays an integral part with the successful capital expansion of SOU's facilities. The past two capital building projects were funded by state bonds that required substantial matching funds that were raised by the Foundation. The Foundation is currently implementing a campaign to raise scholarship funding for SOU students. The Foundation's endowments and investments are administered and monitored by a finance committee designated by the Foundation board of directors. The Foundation's financial statements are audited by an independent auditing firm and are presented fairly in conformity with generally accepted accounting principles.

### **Recommendation**

It is recommended that SOU maintain adequate financial reserves to address the variability in operating revenues and expenses in order to meet the mission and goals of the institution. (Std. 7.B.7 – Adequacy of Financial Resources)

## **Standard Eight Physical Resources**

### **Instructional and Support Facilities**

SOU is situated on 178 acres with a total of 1,301,095 gross square feet of buildings, including residential halls, on the Ashland campus. A new classroom building of 68,700 square feet is being constructed in Medford as a joint effort with Rogue Community College. The SOU Campus Master Facilities Plan for 2000-2010 shows an average area per student station of 18.5 square feet in 1999 while the occupancy report for 2005 shows 19.6 square feet average area per student station. The increase in space per student reflects an increase in total square foot classroom area from 50,143 to 74,691 (1999-2002) and a decrease of student FTE starting in 2003 from 4,377 to 3,985.

The majority of evidence suggests that maintenance of facilities needs improvement and that there is concern that resources are not adequate to ensure deferred maintenance projects can be performed on a proactive rather than a reactive basis. The effective operation of the institution for the programs offered may be impaired by the condition of the Theater Arts Building for which additional classroom space is needed, and for the Science Building for which facility and equipment concerns are significant.

### **Equipment and Materials**

Equipment for instructional programs appears to be adequate and is inventoried, controlled and properly maintained. Multiple sources of evidence indicate that resources are not adequate to ensure replacement or upgrade of equipment due to budget cuts over the past several years and the current financial condition of the institution.

### **Physical Resources Planning**

SOU's master facility plan expires in 2010. It appears that as new space has been added to the campus since 1999, adequate funding has not been secured to maintain the new space for additional utility and janitorial needs. Capital repairs, remodeling, and renovation projects have been identified. However, the acquisition or allocation of the required capital and operating funds has not occurred.

### **Recommendation**

It is recommended that SOU demonstrate that financial planning is a strategically guided process that provides adequate operating and maintenance funds for current and future facilities and equipment. (Std. 7.A.2 – Financial Planning, Std. 8.A.4 – Instructional and Support Facilities, Std. 8.C.2 – Physical Resources Planning)

## **Standard Nine Institutional Integrity**

All available evidence suggests that Southern Oregon University operates with integrity and dedication to the highest ethical standards. SOU evaluates and revises its policies that are intended to reflect the mission and goals of the university. Participation by appropriate stakeholders in these evaluation and revision processes exists. However, these processes are decentralized across operational areas of the university with little integrated oversight. A substantial challenge for SOU is development of an understanding among all constituencies of the process and structure regarding university policies.

Publications accurately portray the institution and State Board policies adequately address conflict of interest issues. The SOU Human Resources Services website is a key resource in communicating these issues. Academic freedom issues and grievance procedures are effectively addressed by the collective bargaining agreement between the Association of Professors: Southern Oregon University and the Oregon University System. Various Oregon Administrative Rules (OAR) and the Faculty Constitution and Bylaws help assure that faculty and staff are treated fairly. Students' rights and responsibilities are well-portrayed in the Code of Student Conduct.

## **Commendations and Recommendations**

### **Commendations**

1. The Evaluation Committee commends SOU for the transparency, inclusiveness, conscientiousness, and resilience demonstrated by all participants in the development and implementation of the Retrenchment 2007 Plan, which responds to one of the greatest fiscal challenges faced by Southern Oregon University.
2. The Evaluation Committee commends SOU for the dedication and commitment of faculty and staff to student learning and their personal well-being and development. Meaningful interactions with faculty and staff contribute to a high level of student satisfaction.
3. The Evaluation Committee commends SOU for its diverse and successful outreach efforts, including those non-credit programs that serve the educational needs of youth, older adults, working professionals, and community members in the Rogue Valley.

### **Recommendations**

1. The Evaluation Committee recommends that SOU act quickly to finalize its new mission statement and to use this statement to develop an institutional strategic plan that addresses resource allocation, program development, and future initiatives of the university. (Std. 1.A – Mission and Goals, Std. 1.B – Planning and Effectiveness)
2. The Evaluation Committee recommends that SOU develop and implement comprehensive educational assessment plans and ensure that assessment results are used to improve teaching and learning. (Std. 2.B- Educational Program Planning and Assessment, Policy 2.2)
3. To ensure the effectiveness and quality of all faculty responsible for the academic program, the Evaluation Committee recommends that SOU implement a formal annual evaluation cycle for temporary (adjunct) and professional faculty to provide regular and systematic information on faculty performance. (Policy 4.1 – Faculty Evaluation, Std. 4.A.5)
4. The Evaluation Committee recommends that SOU maintain adequate financial reserves to address the variability in operating revenues and expenses in order to meet the mission and goals of the institution. (Std. 7.B.7 –Adequacy of Financial Resources)
5. The Evaluation Committee recommends that SOU demonstrate that financial planning is a strategically guided process that provides adequate operating and maintenance funds for current and future facilities and equipment. (Std. 7.A.2 – Financial Planning, Std. 8.A.4 – Instructional and Support Facilities, and Std. 8.C.2 – Physical Resources Planning)