Southern Oregon University
Retrenchment and Financial Sustainability

SOU Fall 2014 Profile

- Campuses in Ashland and Medford

- Total Enrollment: 6,245 (FTE: 4,353)
  - 88% Undergrad and 12% Graduate
  - 71% Resident and 29% Non-resident
  - 18% Minority and International Population
  - 60%+ First Generation
  - 54% Admitted Undergraduates received a Pell Grant

- Undergraduate In-State Tuition $6,307 per term (15 credits)

- Over 1,000 degrees conferred in the past year

- 70% of graduates remain in Oregon to work

Retrenchment

▸ **Factors Leading to Retrenchment**

- Recommendations from Capacity Study, Program Prioritization, Workforce Analysis, & the Delaware Study
- Enrollment declines of 4.9%, 3.9%, and 2.6% projected for 2014-15
- New OUS policy to record liability of uncollected student AR ($2M transfer)
- Continual decrease in annual state appropriations
- Fund balance drops below 5% at the end of the 2011-13 biennium

▸ **Savings Identified to Build the Fund Balance**

- Academic reorganization and program reduction
- Create a Service Center
- Bookstore outsourced to Barnes & Noble
- Housing's fund balance transfers to E&G
- Reduced faculty positions – 60 FTE

SOU

The Retrenchment Process

▸ **President announces the need for "Retrenchment"** – Nov. 2013

▸ **Process defined by article 11 of the faculty union's CBA**

- ◦ Declaration to enter retrenchment

- ◦ 15 days for 1st comment period

- ◦ Develop a provisional retrenchment plan

- ◦ Release the provisional plan

- ◦ 20 days for 2nd comment period
  (esp. to include input from affected programs)

- ◦ Release a final retrenchment plan - March 2014

The Retrenchment Metrics

- **Financials** Build the fund balance and ensure financial viability
  Savings tracked against the budget pro-forma and reported via quarterly management reports showing a current status of the fund balance.

- **Enrollment** Strengthen the application funnel and grow overall enrollment
  Reporting headcounts, FTE, application funnel data, headcount to FTE ratios all by student mix of resident, non-resident, undergrads, grads, freshmen, transfers.

- **Retention** Improve the 1st to 2nd year and 1st to 3rd year retention rates
  Cohorts to include admitted undergrad students and tracking first to second year and first to third year, while looking at both new freshmen classes, new transfers classes, and total Oregon residents.

- **Course Sizing** Average class size & reduce low enrolled courses
  Track avg. class size and low enrolled courses for lectures, seminars, and distance education excluding labs, activity, independent study, dual enrollment,
  at the lower division, upper division, and graduate levels.

- **Faculty Assignments** Manage efficiencies and accountability of faculty.

Overview of Current Institutional Situation

▶ **SOU is in a Cultural Change**
  ◦ Building communication with all units of the university
  ◦ Organizing a transparent, respectful, communicative administration

▶ **Restructuring of the University**
  ◦ Cooperative faculty management
  ◦ Efficient oversight of course offerings

▶ **Physical Plant Development**
  ◦ New science building, physical education renewal, remodeling of theatre and planning for JPR addition
  ◦ Landscaping, maps, benches, memorials, building pride

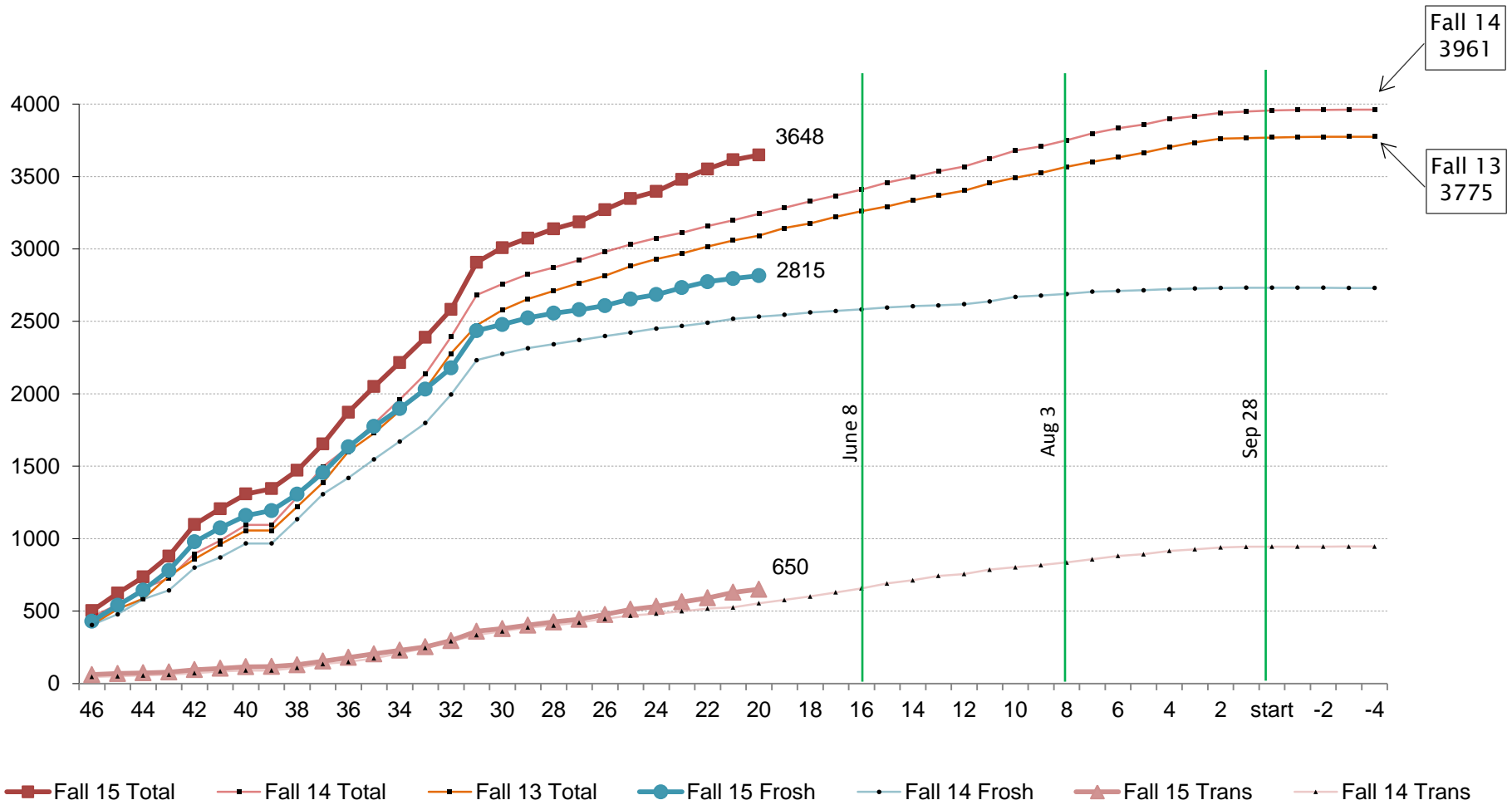▶ **Renewing Relationships with Regional Towns, Rotaries, Local Politicians, High Schools, & Community Colleges**

Historical Retention Rates

First–time, Full–time, Degree Seeking Freshman Retention Rates

First time, full time, degree seeking freshman retention rates
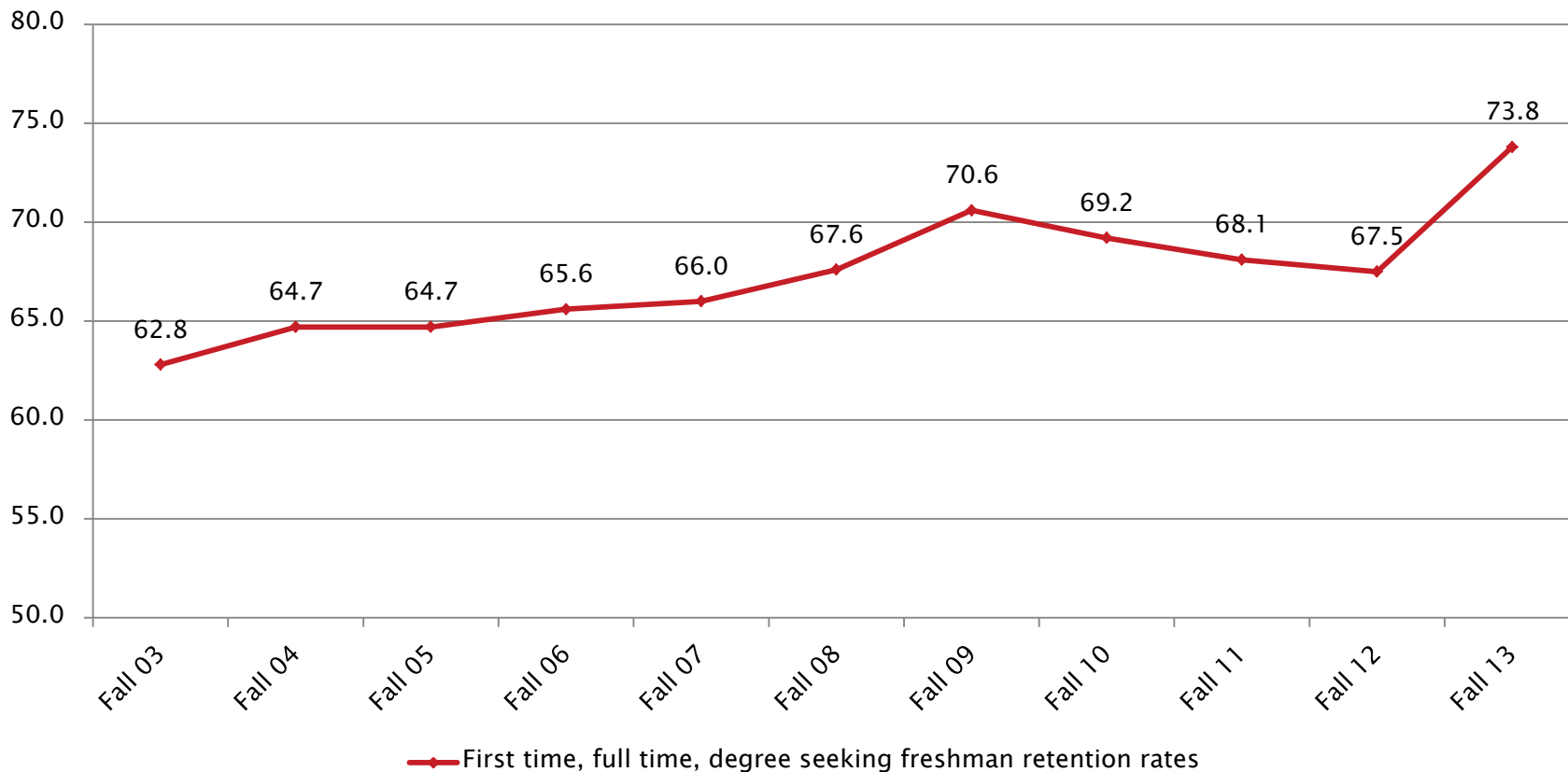
Fall 2015 Applications

Total Fall 15 Applications Also Include 183 Graduate Applications

Long Term Financial Viability

- Enrollment - University Wide Involvement
  - Men's Soccer, Women's Wrestling, Sports Band, Honor's Inclusion

- Follow Through with Retrenchment

- Reinvestment in Areas of Growth

- Physical Growth of STEM, Theatre, Physical Education Facilities

- Shared Governance, Shared Responsibility, Increased Productivity

- Empower Faculty to be Creative and Increased Appreciation

- We are Currently #1 in the Directors Cup of NAIA
  - Set Bar High, Get Buy-In, Support Endeavor=Success

Questions?