Southwestern Oregon Community College

Uniting and Succeeding:
Mission Fulfillment Annual Review

February 26, 2024

Southwestern Oregon Community College fulfills the educational and cultural needs of our diverse communities by providing equitable access to exceptional teaching and learning in a collaborative, engaging, sustainable environment, which supports innovation, lifelong enrichment, and contribution to global society.

In 2020-21, when the strategic plan was formally adopted, leaders outlined a set of guiding principles that were flexible enough to navigate the depths of the global public health crisis through which they emerged. As the pandemic's effects on Southwestern became clear and external conditions began to exhibit preliminary signs of waning, leaders identified several strategic priorities to carry the mission through the end of the strategic planning cycle in 2027:

- Student Success
- Enrollment
- Equity
- Capital

The guiding principles—intentional excellence, lifelong learning, student centeredness, and collaborative innovation—were named formally as institutional values that continue to underpin the college culture.

Since the adoption of the new Priorities, the strategic process of evaluating the internal and external conditions to establish desired trajectories for growth has been iterative and participatory. Countless formal and informal conversations with the Executive Team and the College Council, as well as with key working groups such as the Institutional Data Team and the Student Success Committee, have yielded a set of indicators to measure how well each priority is achieved, along with goals for continuous improvement.

During the developmental process of identifying these metrics, the first ever college-wide Planning Day inaugurated the new budget planning season under the mission-based budgeting model. At that time, these key performance metrics were nearing the end-point of their evolution and

refinement cycle, and had been coming into use over a period of many months or longer. Departmental-level action planning, however, is not about hitting a metric—the organizational equivalent of teaching to the test. Rather, strategic action planning is about tangible, on-the-ground changes that make an intentional, and meaningful difference in each of the strategic priorities. An important result of the day's activities was broad recognition of similar tactics, objectives, and ideas that surfaced across departments to advance the mission. A follow-up event for collaboration planning rendered three institutional goals that emerged almost universally as an organic framework from which to hang new initiatives, special projects, and interventions that require new resources:

- Foster a culture of care to serve students and staff;
- Develop a campus-wide approach for ongoing professional development for all staff; and
- Increase collaboration and communication across the college and all work groups.

Measuring the Mission

The new key success indicators for each of the Strategic Priorities do not represent the whole of all data points necessary to understand the depths of the mission. Rather, these metrics have been selected to work together to tell the story of the student and the college experience. Many of the measures are combined metrics, made up of several components that are examined separately by the respective bodies and the leaders and staff in departments responsible for them. These metrics represent immediacy in student outcomes, with many focused on near term antecedents to longer-term results. The short-distance focus holds the attention of the campus community on the individual steps required for learners to reach their overall goal.

Each of the measures are supported by one or more intervention or broader campus initiative, with more in the works following Planning Day. Success of these efforts is evaluated by changes in a strategic success indicator or one of its component parts. The evaluative process is more complex, though holding the metric at the fore encourages faculty and staff to visualize the effect of their personal actions on student achievement.

Goals for continuous improvement illustrate movement and progress. A departure from prior annual summaries based on maintaining a fixed outcome, each strategic indicator is accompanied by an aspirational target to achieve by the end of the strategic planning cycle in 2027, with incremental progress goals for annual improvement. Summarized on a three-level rubric, achievement of the annual rate of progress "meets" the goal; inadequate progress

"needs improvement"; and negative change "does not meet" the annual goal. Goals for the handful of indicators that require near perfection annually, or are already at a satisfactory threshold, are based on sustaining achievement.

Student Success

The heart of the mission, Student Success is the number one priority at Southwestern Oregon. Defined as *promoting student success with an engaging and supportive learning environment in and out of the classroom*, the first of four indicators combines degree completion, transfer, or retention at three years after students become degree-seeking. The remaining three indicators of student success are nearer term, focused on early progress after one year of becoming degree seeking: Continuing, graduating, or transferring; completing a sufficient number of credits to make meaningful progress; and completing gateway math and writing courses, which are required of all degree and certificate programs.

Evidence of achievement of Student Success is mixed, with half the indicators exhibiting adequate annual progress. No progress was evident between the 2022-23 and 2023-24 reporting years in the rate of student success at three years. Moreover, negative change is exhibited for first year continuation, transfer, or completion, and for credit

accumulation of full-time learners. In contrast, clear improvement is evident in credit accumulation among learners who began part-time, and the rates of gateway math and writing completion.

While sustained improvement is required beyond the time horizon of the strategic plan, the precursors to degree completion generally signal a positive outlook if the energy and ideas continue to flow from the campus community. For instance, in fall 2023, the *United for Student Success* campaign was launched to nurture student persistence and retention, with an emphasis on individual ownership and stewardship by staff. By winter term, *United for Student Success* was partnered with the Caring Campus project to provide staff with structure and support to feel empowered in their responsibility for student success. A series of related interventions include a pilot project to provide incentives and support to complete gateway math courses while increasing credit accumulation and encouraging persistence.

Enrollment

With a mission to serve the community broadly, *stabilizing enrollment and expanding educational opportunities in our district* is measured by a combination of four, multi-part and individual indicators of restoration and growth. Indicators reflect Southwestern's wide range of student

populations with diverse academic needs, including new degree-seekers, learners in non-credit courses, and matriculation of nondegree seekers. Under the principle that students can succeed only if they stay enrolled, measures for this priority also include first-term persistence, and the rate that students apply for financial aid to ensure that all who are eligible receive direct support to stay enrolled.

Enrollment also exhibits mixed evidence of success. With half of the indicators meeting the annual goal, the outlook is hopeful. The number of new, degree-seeking students has increased seven percentage points since the baseline measurement, rapidly progressing toward pre-pandemic numbers. While the number of students enrolled in non-credit courses did not increase at a sufficient rate to restore pre-pandemic headcounts by 2027 if sustained, at 17 percentage points, improvement was substantial and the pre-pandemic level of non-credit participation is still within reach. Matriculation rates of nondegree-seeking learners actually declined among high school students enrolled in Southwestern's College Now programs, though exceeded the 2027 aspirational target among learners transitioning from GED completion. Though first-term persistence did not exhibit change from the baseline year to the current reporting year, the rate that new degree-seekers applied for aid edged up a whole percentage point.

Several initiatives and pilot projects have been introduced to increase and stabilize enrollment and access across populations. A number of new degree, certificate, and nondegree credential programs have been developed in partnership with our local workforce organizations, including the addition of a one-year PN certificate to accompany the two-year RN degree program in nursing, applied associate's degrees in agroecology and human services, an early childhood apprenticeship in partnership with the Southern Oregon Workforce Investment Board, and a pre-apprenticeship program in heavy equipment operation. The community choir has finally resumed in winter 2023-24 after an extended intermission that began during the 2019-20 academic year, an important resource, even if non-revenue generating. In addition, grant funding has been secured to pilot test compressed courses between terms to increase persistence from one term to the next, and to recruit and retain in-district learners who identify as male, one of the populations that experienced disproportionate enrollment losses during the pandemic. The college also received a Title III grant that will support enrollment and retention efforts, including purchasing software for course scheduling. Comprehensive initiatives such as *United for Student Success* and the Caring Campus project will shore up the access and persistence components that are necessary to stabilize enrollment.

Equity

Southwestern's mission is only meaningful to the extent that all learners have an equal opportunity to succeed, regardless of the experiences and resources that have shaped them and bring them to our doors. While a culture of equity is practiced one-on-one and requires deep, critical self-reflection, evidence of equity accumulates to student outcomes. To *identify and reduce equity gaps through evaluation and use of data*, measurement of equity compares outcomes across groups, applying a single, mid-range indicator of success: retention, completion, or transfer at one year from becoming degree-seeking. One-year overall success is an important predictor of longer-term success, and is a meaningful timepoint with its own antecedents and results that can be observed while students are still enrolled.

Preliminary analysis of a range of student metrics highlighted six sub-populations of students to monitor success systematically, including learners age 25 and older, learners who identify as Hispanic or Latino, learners who identify as American Indian or Alaska Native, students who received a Pell Grant, those who enrolled less than full-time for their first degree-seeking term, and learners who identify as male. For each student group, first-year success is compared to the rate of success for all other learners. These six groups are not the only sub-populations that are important, but rather a starting point

to guide analysis of equity outcomes and use of results in accordance with current conditions. As data are examined to evaluate special projects and concerns these categories may need to change.

The true aspirational target for equity is a difference in first-year success of less than three percentage points when comparing the primary population to all other students in the cohort. For some groups the difference in outcomes is substantial and likely will require ongoing effort beyond the time frame of the strategic plan to achieve parity. In those cases, the identified target for 2027 reflects one percentage point improvement per year, though the end goal remains parity, plus or minus three percentage points difference across groups.

Differences in first-year success improved to meet or exceed annual expectations for all but one population of students, learners who received a Pell Grant, which exhibited no change between reporting years. Historically, at many institutions Pell Grant recipients often succeed at lower rates than the greater student body, though until recently, the opposite has been the case Southwestern. With changes in the student financial aid needs analysis formula, Pell grant eligibility is expected to shift and outcomes for this group will need to be re-examined and monitored closely.

Participation in Achieving the Dream has helped shine a spotlight on equity since 2013, laying the groundwork for more

focused projects. Special projects such as inclusive housing to foster gender equity, Open Education Resources to reduce financial barriers for course materials, a new project to move data-into-action for parenting students, the newly formed Campus Care Team, and regular events and learning opportunities developed by the institutional IDEA Committee (Inclusion, Diversity, Equity, Access). In addition, the college has partnered with Oregon State University on a grant to increase retention of Tribal students, particularly with a focus on natural resources and forestry pathways. illustrates the range of work undertaken to ensure students with unique needs have the support and resources for success. Currently, participation in NWCCU's Data Equity Fellowship has begun the process of identifying needs and use cases for an internal equity dashboard that will afford actionable data for staff across departments. Together, these and other projects are a cohesive and responsive embodiment of Southwestern's equity framework, with inertia generated by *United for Student Success* and Caring Campus.

Capital

Enhancing capital through stewardship of human, fiscal, technological, and structural resources, represents the assets and infrastructure required to accomplish the other three strategic priorities that are a direct reflection of the mission. Capital success is measured by two human capital outcomes, six fiscal capital outcomes spanning both general operations and development, and two technology outcomes. Many of the Capital success indicators are new, developed through the extensive participatory and iterative process to coalesce into a unified picture of Capital success through seemingly infinite data points used across a number of departments.

Overall, annual progress was achieved for seven of the key indicators, with positive results across all realms. Human Capital, represented by employee satisfaction and median tenure as an estimate of the condition of the workforce, achieved success on both metrics. Notably, results of employee satisfaction, measured by the overall positivity rating on the annual Great Colleges to Work For survey improved by 10 percentage points from baseline.

Fiscal Capital success is measured by two indicators of the strength and flexibility of financial resources, two indicators of general fund revenue optimization, and two indicators of development productivity. While the strength and flexibility of financial resources have been taxed heavily in recent years by unexpected effects of the pandemic, the net operating margin ratio and the primary reserve ratio have both progressed toward recovery, meeting their annual goal. Results are less clear for maintaining general fund revenue generation within the budget target. The ratio of

reimbursable FTE to the state allocation improved from baseline but still fell short of the target, and general fund billing credits were further off target during the current reporting period than baseline. Development productivity was among the strongest successes, exceeding targets both in annual fundraising for the endowment and in scholarships awarded.

Originally isolated as a freestanding strategic asset and simultaneously identified as one of the four core Capital resources, the iterative process of defining key performance indicators has consolidated Technological Capital into the compendium of Capital assets and infrastructure that support Student Success, Enrollment, and Equity. Summarized by technology security and availability, and support for students indicated by the quality of services, these metrics are new and not yet available in full. Evaluating security and availability requires a pair of indicators: total uptime of key resources and a summary of breech attempts. Each of these metrics is made up of a number of smaller values, some of which have been used for routine system monitoring for well more than a year, and others only recently available. Preliminary estimates suggest technology security and availability are meeting goals, though these results will be updated as new monitoring tools and resulting data are brought into production. Monitoring for quality of service has not been routine or systematic.

New procedures and data collection are in development to improve the efficiency and effectiveness of technology support.

As with Student Success, Enrollment, and Equity, a range of initiatives and special projects underly Southwestern's commitment to Capital success. A series of new technology tools and procedures for student payments and purchases have been adopted to reduce expenses to the college and students alike while improving effectiveness of revenue collection. Investments in building security provide a safer environment for the entire campus community without additional workload to the facilities or security staff. New construction projects and land acquisition make better use of existing structural resources both for academic and workforce development courses, including a food truck, a new fire tower, and renovations for dental assisting, paramedicine, computer science, and forestry and agroecology. Improved procedures have been introduced to account more accurately for student participation that generates noncredit FTE. New performance management tools that will support employees are underway, and a new professional development series that emerged during Planning Day and its follow-up collaboration planning will provide tangible skills for staff in all departments to support and retain students more effectively. A sizable investment in cybersecurity has already proven its worth,

preventing a major security breach before any damage could be done, thus keeping all systems intact without disruption and all data safe.

The Story these Numbers Tell

The past few years have been rough on higher education, especially public, open-access institutions.

Results for Student Success are likely to remain volatile as many learners within the time frame of analysis experienced a disjointed educational experience between 2019-20 and 2022-23, including those who opted out altogether and may experience new challenges of unexpected learning loss as they consider returning. The early indicators, however, lend an air of stability and recovery to the overall message—contingent upon sustaining the momentum. *Uniting for Student Success* and Caring Campus must become fused with the underlying artifacts and assumptions of doing business across all departments. Capacity for academic supports such as co-requisite courses and basic needs may need to expand.

The intersection of demographic and pandemic-caused enrollment declines has been breathtaking globally, for institutions as well as for the long-term health of learners and their communities. While enrollments are beginning to rebound at many peer institutions, recovery has been slower at Southwestern. New growth, however, is budding. Results of enrollment outcomes suggest the time is now for buttressing capacity to serve new learners in new ways. With educational attainment in Southwestern's service district resting at just 30 percent of adults age 25 and older holding a two-year or more advanced degree, our community is fertile territory for expansion of both academic and workforce programs. Technical assistance and support from the Rural Guided Pathways project that began in 2022 will assist in developing a structure to enable learners to weave more seamlessly between evolving workforce and academic credit goals, and back again. Even on the brink of spring, postsecondary education is not baseball. To build it does not mean they will come. Recently expanded resources in marketing and recruitment will assist in helping learners to reframe what education can mean personally in the fluid and flexible pathways that seems to be emerging from the students themselves.

Evaluation of two core mission priorities—Student Success and Enrollment—took on a fresh face in 2022 when the Board of Education committed to learner-center practices that stir a sense of belonging among the entire campus community, welcoming and cultivating a diverse student body and workforce (BP 5300 Equity Statement). Perhaps the biggest accomplishment has been to attempt to

measure mission equity in a meaningful way. That it should be led by a largely privileged team, without tokenizing or sidestepping critical stakeholders, has been daunting. Initial results suggest existing programs and resources to support learners with unique needs have been effective. The real message from the results, however, is that these data are an incomplete representation of how equitably the mission is fulfilled. These results do not reflect every underserved or marginalized population at Southwestern, nor the nuances afforded by data that capture experiences that are not easily quantified. The process of monitoring, evaluation, and learning is core to continuous improvement, and perhaps the best tool to learn how to measure the mission equitably.

The infrastructure and assets that support the mission are largely adequate, or improving adequately. The special points of light bolstering Student Success—offered by development especially—cannot, by themselves tip the direction on the fundamental challenge of revenue generation that has floundered during the recent period of unpredictability. Enrollment outcomes suggest a new direction may be imminent, though the lag period of funding will continue to stymie resources in the near term. Yet to be revealed is the effect of the state's new FTE distribution formula that is scheduled to go into effect in the coming year, still untested. Continued monitoring of the early indicators of Student Success and Enrollment discussed in this report will assist in developing interventions that improve learning and completion, as well as revenue under the new formula.

Overall, Southwestern is fulfilling its mission, one student at a time. The path forward will not be easy, but the evidence is optimistic and the staff are united in the vision.

Student Success: Promote student success with an engaging and supportive learning environment in and out of the classroom									
Initiatives	•United for Student Success campaign to increase student retention as well as related precursors such as completion of gateway math and writing courses •Review and revise processes and information to be accessible and user friendly •Improve financial literacy and planning skills								

	Reporting Year								
Indicator	**Baseline**	**2023-24**	**2024-25**	**2025-26**	**2026-24**	**2027-28**	**Target by 2027**	**Change from Prior Year**	**Annual Level of Target Achievement**
SS1. Percent of new, degree-seeking student cohort who graduate, transfer, or retain at 3 years (2019-20 cohort, N = 802) Annual goal >= 0.5% increase per year from baseline toward target	52% 2018-19 cohort	**52%** 2019-20	2020-21	2021-22	2022-23	2023-24	55% +0.5% / yr	**0%**	needs improvement
SS2. Percent of student cohorts who continue, graduate, or transfer by one year (2021-22 cohort, N = 692) Annual goal >= 1% increase per year from baseline toward target	60% 2020-21 cohort	**59%** 2021-22	2022-23	2023-24	2024-25	2025-26	65% +1% / yr	**-1%**	did not meet
SS3. Percent of student cohorts who accumulate 30+/12+ credits within first year (2021-22 cohort)									
(a) 30+ credits for students who start full-time (N = 480) Annual goal >= 1% increase per year from baseline toward target	57% 2020-21 cohort	**54%** 2021-22	2022-23	2023-24	2024-25	2025-26	62% +1% / yr	**-3%**	did not meet
(b) 12+ credits for students who start part-time (N = 212) Annual goal >= 1% increase per year from baseline toward target	26% 2020-21 cohort	**28%** 2021-22	2022-23	2023-24	2024-25	2025-26	31% +1% / yr	**2%**	met
SS4. Percent of student cohorts who complete gateway courses within first year (2021-22 cohort)									
(a) Passed gateway math with C or above (N = 399) Annual goal >= 1% increase per year from baseline toward target	26% 2020-21 cohort	**30%** 2021-22	2022-23	2023-24	2024-25	2025-26	31% +1% / yr	**4%**	met
(b) Passed gateway writing with C or above (N = 400) Annual goal >= 1% increase per year from baseline toward target	40% 2020-21 cohort	**43%** 2021-22	2022-23	2023-24	2024-25	2025-26	45% +1% / yr	**3%**	met

Enrollment: Stabilize enrollment and expand educational opportunities in our district									
Initiatives	•Develop a comprehensive, campus calendar to improve interdepartmental collaboration								
	Reporting Year							**Change from Prior Year**	**Annual Level of Target Achievement**
Indicator	**Baseline**	**2023-24**	**2024-25**	**2025-26**	**2026-24**	**2027-28**	**Target by 2027**		
En1. Annual growth rate of new student cohort and total enrollment									
(a) New, degree-seeking students (2022-23 cohort)	692	**743**					810	**7%**	met
Annual goal >= 3.5% increase per year from baseline toward target	2021-22 cohort	2022-23	2023-24	2024-25	2025-26	2026-27	**+3.5% / yr**		
(b) Total headcount in non-credit courses (2022-23 AY)	2,289	**2,674**					4,865	**17%**	needs improvement
Annual goal >= 22% increase per year from baseline toward target	2021-22 data	2022-23	2023-24	2024-25	2025-26	2026-27	**+22% / yr**		
En2. Matriculation rate of nondegree-seeking learners									
(a) Percent of College Now students who matriculate (2021-22 AY, N = 336)	39%	**37%**					44%	**-2%**	did not meet
Annual goal >= 1% increase per year from baseline toward target	2020-21 data	2021-22	2022-23	2023-24	2024-25	2025-26	**+1% / yr**		
(b) Percent of GED completers who matriculate (2022-23 AY, N = 47)	41%	**48%**					46%	**7%**	exceeded
Annual goal >= 1% increase per year from baseline toward target	2021-22 completers	2022-23	2023-24	2024-25	2025-26	2026-27	**+1% / yr**		
En3. Percent of student cohorts who stay enrolled after one term (2022-23 cohort, N = 743)	71%	**71%**					76%	0%	needs improvement
Annual goal >= 1% increase per year from baseline toward target	2021-22 cohort	2022-23	2023-24	2024-25	2025-26	2026-27	**+1% / yr**		
En4. Percent of student cohorts who apply for financial aid (2022-23 cohort, N = 743)	73%	**74%**					78%	**1%**	met
Annual goal >= 1% increase per year from baseline toward target	2021-22 cohort	2022-23	2023-24	2024-25	2025-26	2026-27	**+1% / yr**		

Equity: Identify and reduce equity gaps through evaluation and use of data									
Initiatives		•Develop a comprehensive set of trainings to develop tangible skills in practices and interventions that support and care for students							

Difference between the primary group and all other students in the percent of student cohorts who continue, graduate, or transfer by one year (2021-22 cohort, N = 692)

Long-term target < 3% difference across groups; Annual goal >= 1% reduction in the difference in outcome across groups

Indicator	Baseline Gap	Reporting Year						Target by 2027	Change from Prior Year	Annual Level of Target Achievement
		2023-24	2024-25	2025-26	2026-24	2027-28				
	2020-21 cohort	2021-22	2022-23	2023-24	2024-25	2025-26	- 1% / yr			
Eq(a) Students age 25 and older (N = 146)	12%	**9%**						< 7%	**2%**	met
Eq(b) Students who identify as Hispanic or Latino(a) (N = 110)	5%	**-3%**						< 3%	**8%**	exceeded
Eq(c) Students who identify as American Indian or Alaska Native (N = 63)	11%	**2%**						< 6%	**8%**	exceeded
Eq(d) Students who received a Pell Grant (N = 252)	5%	**5%**						< 3%	**0%**	needs improvement
Eq(e) Students who started as part-time (N = 212)	27%	**24%**						< 22%	**3%**	met
Eq(f) Student who identify as male (N = 305)	-1%	**2%**						< 3%	**-3%**	met

Capital: Enhance capital through stewardship of human, fiscal, technological, and structural resources									
Initiatives	•Revise and revitalize Leadership SWOCC •Rejuvenate the deferred maintenance and facilities master plans								
	Reporting Year								
Indicator	**Baseline**	**2023-24**	**2024-25**	**2025-26**	**2026-24**	**2027-28**	**Target by 2027**	**Change from Prior Year**	**Annual Level of Target Achievement**
HC1. Employee satisfaction estimated by Modern Think overall positivity score (2023, n = 96) Annual goal >= 1% increase per year from baseline or sustain within 1%	55% spring 2022 survey	**66%** spring 2023	spring 2024	spring 2025	spring 2026	spring 2027	60% **+1% / yr**	**11%**	exceeded
HC2. Condition of the workforce as median tenure of benefitted employees (N = 203) Annual goal = sustain within 0.5 year of target	6 years 2021 fall snapshot	**4 years** 2022	2023	2024	2025	2026	4.1 years	**-2**	met
FC1. Net operating margin ratio (3-yr average ending 2022-23) Annual goal >= 0.5% increase per year from baseline toward target	-2.95% 2019-20 to 2021-22	**1.58%** 2020-21 to 2022-23	2021-22 to 2023-24	2022-23 to 2024-25	2023-24 to 2025-26	2024-25 to 2026-27	>= 2% **+0.5% /yr**	**4.53%**	met
FC2. Primary reserve ratio (3-year average ending 2022-23) Annual goal >= 3% increase per year from baseline toward target	12% 2019-20 to 2021-22	**17%** 2020-21 to 2022-23	2021-22 to 2023-24	2022-23 to 2024-25	2023-24 to 2025-26	2024-25 to 2026-27	20% to 30% **+ 3% / yr**	**5%**	met
FC3. Percent of general fund billing credits within budget target (2022-23) Annual goal >= 0.5% increase per year from baseline toward target	3.12% 2021-22 AY	**6.05%** 2022-23	2023-24	2024-25	2025-26	2026-27	< 3% **+0.5% / yr**	**2.93%**	did not meet
FC4. Annual FTE generation as a percent of FTE state allocation (3-yr weighted average ending 2022-23) Annual goal >= 3% of allocation	13.10% 2021-22	**8.64%** 2022-23	2023-24	2024-25	2025-56	2026-27	within 3%	**-4.46%**	needs improvement
FC5. Fundraise between $100,000 and $200,000 annually for the Foundation Endowment Fund (3-yr average) Annual goal >= target range	$185,847 2019-20 to 2021-22	**$224,438** 2020-21 to 2022-23	2021-22 to 2023-24	2022-23 to 2024-25	2023-24 to 2025-26	2024-25 to 2026-27	$200,000	**$38,591**	exceeded
FC6. Award at least $250,000 in Foundation Scholarships annually Annual goal >= target	$234,000 2021-22 FY	**$293,939** 2022-23 FY	2023-24 FY	2023-24 FY	2023-24 FY	2023-24 FY	$250,000	**$59,939**	exceeded
TC1. Security and availability									
(a) Total uptime of network, servers, phones, and ERP Annual goal >= maintain 99.7% across all systems	99.90% 2023-24 projection	**99.90%** 2023-24 projection	2023-24 AY	2024-25	2025-26	2026-27	99.70%	**n/a**	met
(b) Ratio of successful security breaches to total breach attempts Annual goal = maintain 0/∞	0/365 2023-24 projection	**0/365** 2023-24 projection	2023-24 AY	2024-25	2025-26	2026-27	0 / ∞	**n/a**	met
TC2. Support for students as indicated by quality of service measured by ticketing system Annual goal = TBD	TBD 2024-25 AY	n/a							TBD

Annual goals for each indicator are met if the change in the metric is sufficient to achieve the 2027 target, assuming steady improvement through the end of the strategic planning period. Indicators that exhibit no change over a year, or insufficient growth to achieve the target need improvement. Indicators that exhibit negative change do not meet the annual goal. Items for which the 2027 target requires near 100 percent compliance, and those items for which the target is met or exceeded, the annual goal is based on sustaining success.

For the Student Success, Enrollment, and Equity strategic indicators, student cohorts include learners who enroll as degree-seeking for the first time during fall, winter, or spring of a given academic year, including those who have never earned college credits, those who transfer into Southwestern with credits from another college, high school graduates who previously earned college credits through Southwestern's College Now programs, or students who earned other credits as non-degree seekers. Student cohorts include learners whose first degree-seeking term may be full-time (12 or more credits) or part-time (11 or fewer credits).

All indicators of Student Success outcomes are based on cohorts. Three indicators of Enrollment growth are based on cohorts, En1(a), En3, and En4. All indicators of Equity outcomes are based on cohorts. Success indicators for other classifications of students include the population of learners who were enrolled during summer, fall, winter, or spring

of a given academic year. See notes on individual items for details.

Several items are combined metrics, either composite or index scores. Other items represent milestone outcomes that are supported by one or more antecedent measures, or are examined in shorter time increments, such as monthly or quarterly. In all cases, supervisors and work groups evaluate the individual component, incremental, and antecedent metrics to inform management decisions, innovation, and resource allocation.

Student Success

SS1. Three-year success is a lagging indicator, and set at 0.5 percentage point increase per year from baseline.

SS2, SS3(a), SS3(b), SS4(a), SS4(b). For early indicators, targets for 2027 achievement levels, and corresponding annual goals for continuous improvement, are set at 1 percentage point increase per year from baseline, similar to measurement used by Achieving the Dream.

Enrollment

En1(a), En1(b). Aspirational targets for indicators of overall enrollment growth by 2027 set at 2018-19, pre-pandemic levels. Annual growth goals sufficient to meet the target by 2027 requires increasing one-fifth of the difference from baseline.

En1(a). New degree-seekers matches the definition of cohorts used to measure indicators student success and equity. Students are only counted in one cohort.

En1(b). The number of learners enrolled in non-credit courses represents the total, unduplicated headcount for the academic year. Learners are counted only once over the course of the academic year, but may be counted in multiple academic years.

En2(a), En2(b), represent indicators of matriculation of non-degree seeking students who have participated in Southwestern's adult pre-college and high school programs. Targets for 2027 and annual improvement goals set at one percentage point increase per year, from baseline.

En2(a). Matriculation of College Now participants is based on enrollment in regular college courses at Southwestern within two years of students' most recent College Now term. College Now students who enroll in summer term only are not included as matriculants. Learners who earn an associate's degree during College Now participation are counted as matriculants due to earning a fully-transferrable degree from Southwestern.

En2(b). The adult pre-college programs are more expansive than GED completions, though GED is the only one of the three programs that aligns directly with adult educational attainment in the service district. In addition, GED completion is, by definition, a milestone designating an end-point in the pre-college program, enabling an estimate of matriculation within one year of completion. The other adult pre-college programs do not have a clear endpoint or completion milestone.

En(3), En(4), represent indicators of access. These indicators are measured by student cohorts, as defined for Student Success, new degree-seekers (En1(a)), and Equity. Targets for 2027 and incremental goals for annual growth are set at one percentage point increase per year.

Equity

Eq. Indicators of equity focus on equitable achievement of one key student outcome across several sub-populations within student cohorts. The difference in outcome is compared between the population of interest and all other students in the cohort.

Student persistence and retention, transfer, or completion after one full year at Southwestern was selected as an indicator of early achievement, and one of the most important antecedents to longer term success. Long-term, the aspirational target for equity requires a difference, or gap, of less than three percentage points in outcome achievement between the primary population of interest and all other students in the cohort. Reducing the difference in outcomes to a satisfactory level for some populations will likely require continuous improvement beyond the time period of the current strategic plan. For these populations, mid-term targets for 2027 and annual improvement goals are set at one percentage point reduction in the outcome gap each year. This rate of improvement in equity across groups is slightly more aggressive than that established by Achieving the Dream, with targets for equity improvement set a two percentage point gap reduction over a three-year period.

Negative gap figures indicate the amount the primary group outperformed all other students.

A student may be included in multiple populations of interest, though is only counted once for each population comparison. Notably, race and ethnicity typically are presented as reported to IPEDS, in a single, combined category in which students can fall into exactly one category, one of which is multiracial. For this summary, learners are allowed to be counted in more than one category for race, and Hispanic or Latino(a) is treated as a separate ethnicity, similar to the way data are collected by the U.S. Census. A student who identifies as American Indian or Alaska Native, and also identifies as white is included in the primary population of interest for Eq(c), though would be reported to IPEDS as multiracial. If this same student also identifies as Hispanic or Latino(a), the student would be counted in the primary population of interest for both Eq(b) and Eq(c), though would be reported to IPEDS as Hispanic or Latino(a) rather than multiracial. Representing learners in a series of binary comparisons is a more accurate portrayal of the population at Southwestern Oregon, and accounts for multiple intersecting identifies in a way that can inform planning and resource allocation.

Rate of Success at First Year, 2021-22 Cohort (Continue, Complete, or Transfer)			
	Primary Group	All Other Learners	Difference
Age > 24 years	52%	61%	9%
Hispanic/Latino	62%	59%	-3%
American Indian or Alaska Native	57%	60%	2%
Pell Recipients	56%	61%	5%
Part Time	42%	67%	24%
Male	58%	60%	2%

Capital

Capital represents the strategic assets and infrastructure required to promote the primary vision for mission achievement: Student Success, Enrollment, and Equity.

Human Capital

HC1. Employee satisfaction has been measured by Modern Think's annual Great Colleges to Work For Survey. The overall positivity score is an index value that summarizes employee sentiment about the employer during the time period, drawing from a number of survey questions.

HC2. Condition of the workforce is an estimate of employment security and workforce stability as indicated by the balance of new and veteran employees.

Data presented include employees in positions with benefits who were included in the annual snapshot as of November 1. Benefitted employee positions include both part-time and full-time employees, though excludes employees in temporary, student, retired, and adjunct positions. The median tenure target is benchmarked on data from the U.S. Bureau of Labor Statistics most recent survey of employee tenure with their employer for employees in the education services industry. The target for 2027 is set at 4.1 years (USDL-22-1894). Radical shifts in the biennial survey result that suggest changes in the national employment and economic trends will prompt re-evaluation of the long-term target.

Fiscal Capital

FC1, FC2. Goals for net operating margin ratio (FC1) and primary reserve ratio (FC2) are based on guidelines set by National Association of College and University Business Officers as an estimate of the strength and flexibility of institutional resources. Net operating margin ratio (FC1) is the annual revenues minus annual expenses divided by the annual revenues. Primary reserve ratio (FC2) is computed by the expendable assets divided by total expenses as a reflection of the length of time the college could continue to operate if revenues are interrupted.

FC3, FC4. Targets for 2027 and annual goals for percent within budget targets of general fund billing credits (FC3) and reimbursable FTE generated (FC4) set for budget stability

FC5, FC6. Endowment fundraising (FC5) and Foundation scholarship (FC6) are goals set by the independent, 501(c)3 Southwestern Foundation Board of Directors. The target scholarship fundraising goal is set at a minimum level sufficient to sustain student awards. The target corpus fundraising goal is set to weather short-term market fluctuation and ensure annual gift aid keeps pace with inflation and/or grows to increase support for the college, its students, and its programs.

General Fund Billing Credits			FTE Generated/Allocation	
Fiscal Year	Target	Actual	Actual FTE Generated	FTE Allocation
2019-20	51,000	47,578	1962	2304
2020-21	44,000	42,542	1569	2137
2021-22	44,000	42,626	1606	1848
2022-23	43,000	40,398	1555	1702

Technological Capital

TC1. Technology security and availability is represented by two metrics. Data monitoring tools and procedures have not been available uniformly across system and thus the current reporting year (2023-24) has been used to establish the baseline. Data for the 2023-24 academic year includes only partial year results, though will be sufficient to estimate baseline outcomes and to set goals for sustaining success. Data for the complete academic year will be reported in full during the subsequent reporting year, and the baseline data will be updated to reflect actual results at that time.

TC1(a), technology availability is summarized with a composite measure of the scheduled uptime for key technology resources, including the internal and external networks, servers, phone system, and ERP during the academic year. Internal, uptime targets are based on standard expectations of service-level agreements with vendors, and does not include scheduled downtime required for preventative maintenance and upgrades. Using a combined metric accounts for major interferences to security or availability that may prevent students, staff, or community members from accessing resources through one system, but would not affect their access on another system.

TC1(b), technology security is summarized by the ratio of successful security attacks to all verified attacks during the academic year. Security breaches can be successful without causing down time, so are not necessarily captured in the summary of total technology availability. Critical incidents that result in averted attacks will be noted in the annual narrative.

TC2. Support for students as measured by the quality of services is a new metric that has not been tracked previously. The ticketing system is being reconfigured to track the number of responses required to resolve a ticket, length of time a ticket remains open before resolve, student or staff help requests, whole group or class requests versus individual requests, and requests for support to resolve personal or college-related technology needs. Together these metrics for effective management are an estimate of quality rather than quantity of services. Tracking will begin by spring 2023-24, with preliminary results available after the close of the academic year to estimate targets, though full baseline measurement will begin summer 2024-25.