OREGON UNIVERSITY SYSTEM

Annual Performance Progress Report (APPR) for Fiscal Year (2012-2013)

Original Submission Date: 2013

Finalize Date: 9/3/2013
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<td>COST MINUS GRANT AID AS A PERCENT OF INCOME - Cost of attendance at OUS for a resident undergraduate (tuition &amp; fees, room &amp; board, other expenses) minus grant aid as a percent of median income.</td>
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</tr>
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<td>11</td>
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</tr>
<tr>
<td>2012-2013 KPM #</td>
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</tr>
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</tr>
<tr>
<td>15</td>
<td>BACHELOR'S DEGREES - Total number of bachelor's degrees granted.</td>
</tr>
<tr>
<td>16</td>
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</tr>
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<td>ENGINEERING AND COMPUTER SCIENCE DEGREES - Total number of degrees granted in engineering and computer sciences (all levels; includes multiple majors).</td>
</tr>
<tr>
<td>18</td>
<td>SPONSORED RESEARCH - Total sponsored research and development dollars supported by external fund sources ($ in millions) a) Total, b) Federal sources, c) Private sources.</td>
</tr>
<tr>
<td>19</td>
<td>RESEARCH DOLLARS PER FACULTY - Sponsored research dollars per faculty at research/doctoral universities - OSU, PSU, UO ($ in thousands).</td>
</tr>
<tr>
<td>20</td>
<td>Philanthropy - Total gifts from philanthropic sources ($ in millions). A) Total, B) Capital Projects, C) Faculty Support (including chairs), D) Scholarships, E) Other.</td>
</tr>
<tr>
<td>21</td>
<td>STATEWIDE PUBLIC SERVICES EXTERNAL FUNDS - External funds generated per state dollar invested in Statewide Public Services (SWPS).</td>
</tr>
<tr>
<td>22</td>
<td>CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as &quot;good&quot; or &quot;excellent&quot;: overall, timeliness, accuracy, helpfulness, expertise, availability of information.</td>
</tr>
<tr>
<td>23</td>
<td>Boards and Commissions Best Practices: Percent of total best practices met by the Board.</td>
</tr>
</tbody>
</table>
**Agency Mission:** 351.009 Mission of education beyond high school. The Legislative Assembly declares that the mission of all education beyond high school in Oregon includes achievement of the following by 2025: (1) Ensure that at least 40 percent of adult Oregonians have earned a bachelor's degree or higher; (2) Ensure that at least 40 percent of adult Oregonians have earned an associate's degree or post-secondary credential as their highest level of educational attainment; and (3) Ensure that the remaining 20 percent or less of all adult Oregonians have earned a high school diploma, an extended or modified high school diploma or the equivalent of a high school diploma as their highest level of educational attainment. [1993 c.240 &5; 2011 c.638 &3]

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**Alternate Phone:** 541-346-5758

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### Performance Summary

- **Green** = Target to -5%
- **Yellow** = Target -6% to -15%
- **Red** = Target > -15%
- **Exception** = Can not calculate status (zero entered for either Actual or

**Total:** 100.0%

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**1. SCOPE OF REPORT**

*Agency programs/services addressed by key performance measures*
OUS key performance measures (KPMs) address each aspect of the higher education mission – most easily discussed in three broad categories: instruction, research, and public service. Instruction measures assess student access and progress, degree completion, academic quality, and student success and satisfaction. Research measures focus on grant and contract expenditures as well as faculty productivity. The Statewide Public Services measure addresses one aspect of the public service component of higher education’s mission.

*Agency programs/services, if any, not addressed by key performance measures*

OUS campuses engage in performance measurement at nearly every level of operations and many of the programs/services not addressed in these KPMs represent a level of detail monitored more appropriately –and usefully – at the system and campus levels. Additional system- and campus-level data and analysis are available online (www.ous.edu) in the annual *Performance Report to the Oregon State Board of Higher Education*, the Oregon Education Investment Board (OEIB) Achievement Compacts, the *OUS Fact Book*, and on individual campus websites.

2. THE OREGON CONTEXT

The level of educational attainment achieved by Oregon citizens is critically important to the prosperity of Oregonians and the state. Better job prospects and income for citizens; a stronger, more competitive labor force and economy; a greater likelihood for innovation and job creation; and higher state revenues from individual and business taxes are all benefits to the state as a result of having an educated citizenry.

Governance for Oregon’s public institutions of higher education has been undergoing change for the past few years, with some of the most overarching and fundamental changes occurring during the past two legislative sessions. In June 2011, Senate Bill 242 created the Higher Education Coordinating Commission (HECC) that will coordinate postsecondary policy for all public higher education institutions in Oregon. Senate Bill 909, also passed in the 2011 session, established the Oregon Education Investment Board (OEIB) to oversee a unified public education system. It defines OEIB membership, governance, and directs OEIB to provide and maintain an integrated, statewide student-based data system.

Oregon’s legislative assemblies passed SB 270 and HB 3120 during the 2013 legislative session. The first, SB 270, further transforms the higher education landscape in Oregon. It accomplishes the following objectives:

- Authorizes institutional governing boards at Portland State University and the University of Oregon,
- Provides an option for Oregon State University to choose to have an institutional governing board [1]
- Provides an option for Oregon’s regional and technical universities to establish institutional governing boards upon approval from the State Board of Higher Education,
- Grants institutional governing boards discrete powers currently held by the State Board of Higher Education, including but not limited to: the ability to hire and fire university presidents, to issue revenue bonds in consultation with the Oregon State Treasury, and to set tuition within limits established by the legislature,
- Transfers statewide academic and policy coordination for public universities from the State Board of Higher Education to the Higher
Education Coordination Commission,
- Requires all seven universities to continue to participate in certain shared administrative services through June 2015,
- Provides protections for universities designed to mitigate any financial harm caused universities opting out of administrative shared services, and
- Establishes The Special Committee on University Governance and Operations and The Work Group on University Shared Services and enables these groups to recommend legislation for consideration in the 2014 legislative session.

The second major restructuring bill of 2013, House Bill 3120, consolidates policy making for post-secondary education by merging existing authorities of the State Board of Education for community colleges, the State Board of Higher Education for all seven universities, the Oregon Student Access Commission, the Office of Degree Authorization, and the Higher Education Coordinating Commission. As of this writing, it is unknown what the relationship will be between the HECC and the OEIB, what portfolio of services will be shared between the seven institutions, or if the three regional campuses (EOU, SOU, WOU) and OIT will request their own governing boards. For this reason, many of the specific actions and implementation plans needed to make improvements on student retention, graduation rates, access, affordability, student faculty ratio, research expenditures, and other statewide performance measures at the institutions are yet to be determined.

Under the leadership of Governor Kitzhaber and the Oregon Education Investment Board (OEIB), the OUS overall, each OUS institution, and other education sectors have developed Achievement Compacts with detailed measures to inform and guide their work. Reported outcomes and targets toward 40-40-20 completion rates for all Oregonians are a major component of the Compacts. Within outcome measures, Achievement Compacts denote actual figures for all Oregonians as well as disadvantaged students, who are defined as being either a member of an underrepresented racial or ethnic group and/or eligible to receive a Pell Grant.

Each of Oregon’s public universities- operating under a state system or alone under individual boards- will continue to be engaged in a range of diverse activities to meet Oregon’s educational attainment and workforce needs. These include re-engaging citizens, keeping students enrolled and making sure they graduate, academic advising, articulation agreements to ease transition between community college or high school and universities, scholarships and incentives to help students better afford college, and providing readily available decision-making tools so students can assess their own progress toward degree attainment.

[1]The president of Oregon State University exercised the option for a governing board in August 2013

3. PERFORMANCE SUMMARY

MAKING PROGRESS (target to -5%):
First-time freshmen (#2), community college transfers (#3), persistence (#5), completion (#6), transfer student completion (#7), freshman time to degree (#8), transfer time to degree (#9), student to faculty ratio (#11), bachelor’s degrees (#15), advanced degrees (#16), engineering and computer science degrees (#17), philanthropy (#20), SWPS external funds (#21). AREAS TO WATCH (target -6% to -15%):
4. CHALLENGES

Shrinking state investment coupled with enrollment growth over the past few years is forcing Oregon universities to a critical point by creating pressure in areas such as class size and availability, support and facilities, and the ability to recruit and retain high-quality faculty. Despite significant achievements in leveraging external financial support to help mitigate lower levels of state funding, the effects of long-term disinvestment are apparent in the key performance areas of affordability, and advanced degree production. During the next biennium, the most significant challenge will be in implementing the governance reforms set forth in Senate Bill 270 and House Bill 3120.

5. RESOURCES AND EFFICIENCY

The OUS operating budget covers education and general program expenses at all seven OUS institutions, the OSU-Cascades Campus, and the Chancellor’s Office. It also includes programs initiated through OUS Industry Affairs such as the Engineering and Technology Industry Council (ETIC), the Oregon Pre-Engineering and Applied Sciences Initiative (OPAS), the Oregon Metals Initiative (OMI), and the Oregon Robotics Tournament and Outreach Programs (ORTOP). Statewide Public Services --the Agricultural Experiment Station, the Extension Service, and the Forest Research Laboratory-- are also included in the OUS operating budget. Other targeted programs include regional access and support, sponsored and signature research support, as well as campus institutes for dispute resolution, natural resources, Oregon Solutions, Oregon Climate Change Research Institute, health professions.

The OUS operating budget for 2013-2015 approved by the Legislature is $761.5 million, which includes $728 million in General Fund ($15 million of which is earmarked to “buy down” tuition increases for resident undergraduate students to 3.5%), and $34 million in Lottery Funding. This is an increase of 10.2% over 2011-2013 funding for OUS, which was $691 million (included State General Fund of $668 million and lottery funding of $23 million).

Out of the total 2013-2015 budget:

- **Total University Support** is $497 million (includes areas such as enrollment funding, regional support, and student instruction related support). This is up 10.3% from $451.5 million in 2011-2013.
· **Statewide Public Services** (through Oregon State University) is $101 million, with Agricultural Experiment Station at $55 million, Extension Services at $40 million, and Forest Research Lab at $6 million. This is up 6.5% from $95 million in 2011-2013.

· **State Programs** total $40.5 million (includes areas such as ETIC @ $29M, Oregon Solutions @ $2.2M, Dispute Resolution Centers at UO and PSU @ $2.4M, PSU Population Research Center @ $421K, and many others). This is up 12.7% from $36 million in 2011-2013.

· **Debt Service** totals $114.7 million, with $89.1 in General Fund and $25.6 in Lottery funding. This is up 13.4% from $101.2 million in 2011-2013.

· **Sports Action** totals $8 million for 2013-2015 intercollegiate athletics including Title IX, and for graduate student scholarships funded by Lottery. This is down 4.8% from $8.4 million in 2011-2013.

OUS capital budget for 2013-2015 approved by the Legislature is $566.9 million in bonding authority for new construction, capital repair, deferred maintenance and seismic upgrades. There was no General Fund in the capital budget. This is more than double the $278.5 million provided in 2011-2013. These projects will provide an estimated 6,000 jobs directly related to new construction, renovation and repair across Oregon at all seven OUS campuses, located in both rural and urban areas in the state.
## II. KEY MEASURE ANALYSIS

### KPM #1
COST MINUS GRANT AID AS A PERCENT OF INCOME - Cost of attendance at OUS for a resident undergraduate (tuition & fees, room & board, other expenses) minus grant aid as a percent of median income.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Access: Expand access to students who meet admission standards – lower income students</th>
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</thead>
<tbody>
<tr>
<td>Oregon Context</td>
<td>OBM24 – Some college completion, OBM26 – College completion, OBM11 – Per capita income</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Institutional Research Services, US Census ACS</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

### 1. OUR STRATEGY

Establish tuition and financial aid policies and practices to ensure that qualified Oregonians have access to public universities.

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![Graph depicting Cost Minus Grant Aid as a Percent of Income from 2003 to 2015. The bar graph shows the actual percentage, while the line graph indicates the target. Data is represented by percent.](image-url)
2. ABOUT THE TARGETS

Ideal performance on this measure is a declining ratio of cost to income. The 2014 and 2015 targets of 28% represent a slight increase of prior targets, taking into account tuition increases occurring in 2012 and 2013 and little to no growth in Oregon median family income.

3. HOW WE ARE DOING

The most recent available data shows that the median family income level grew in 2011, following a two-year decline. This increase combined with a slight flattening of the increase in the cost of attendance and in grant aid in resulted in a 1-percentage point improvement in this metric for 2011, the most recent year available.

4. HOW WE COMPARE

A report by the Delta Cost Project, *Trends in College Spending 1999-2009*, ranks Oregon’s “average education and related expenses per FTE student” among the lowest in the nation but the student share of those costs ranks among the highest at 69% for research universities and 52% for master’s institutions.

Despite campus efforts to cut budgets, find cost savings, and absorb more students without receiving additional enrollment funding, students took much of the burden of this disinvestment through tuition increases that were not fully offset by increases in state and federal financial aid. Since 1990, even after adjusting for inflation, tuition and fees at OUS universities have more than doubled as costs shifted from the state to students. Nationally, many states have seen the share of college costs shift, over the last decade especially, from the state to the student.

In Oregon in 1989-90, students paid 29% of the total per student cost; with the budget challenges of late, the student share has risen to an all-time high of 72% for 2011-12. The cost for higher education in Oregon is disproportionately borne by students when compared to the rest of the nation’s public 4-year institutions. Nationally, Oregon ranks 15th for tuition and fee revenue per FTE among public 4-year institutions and 44th in the nation in state appropriation per FTE.[1]

[1] Sources: IPEDS Finance, IPEDS Fall Enrollment; 2010-11 data

5. FACTORS AFFECTING RESULTS

Tuition and resource fees, non-tuition costs (room and board, supplies, etc.), family income, and financial aid all play critical roles in affordability. While non-tuition costs and income are primarily driven by the economy, employment trends, and financial markets, state
investment and tuition play the greatest role in the “sticker price” of higher education. State investments made during the 2007-2009 legislative session allowed the student share of college costs to decrease for the first time in several biennia. The result was an immediate increase in participation throughout Oregon postsecondary education sectors. However, reductions in OUS operating funds over the 2009-2011 and 2011-2013 biennia have necessitated greater increases in tuition and resource fees, effectively lowering the rate of progress made in college affordability.

Fortunately, the OUS operating budget for the current biennium, recently approved by the Legislature is $761.5 million and includes $728 million in General Fund ($15 million of which is earmarked to “buy down” tuition increases for resident undergraduate students to 3.5%), and $34 million in Lottery Funding. This is an increase of 10.2% over 2011-2013 funding for OUS, which was $691 million (included State General Fund of $668 million and lottery funding of $23 million).

6. WHAT NEEDS TO BE DONE

The Oregon Opportunity Grant was structured in 2004-05 to a Shared Responsibility Model based on an underlying framework that all partners—the state, the federal government, the family, and the student—would share responsibility in ensuring affordable access. In recent years, due to the state funding challenges, the state investment has not kept pace with the number of eligible students and financial need. The OOG grant dollars awarded to OUS students fell from a high of $33.8 million in 2008-09 to $5.8 million in 2010-11, then increased to $23.7 million in 2012-13. The OUS was able to keep tuition increases aligned with increases in median family income (in the 3% range annually) in the 2005-2007 and 2007-2009 biennia, but decreases in state appropriations for higher education forced tuition increases above the increases in median family income in 2008-09, 2009-10, and 2010-11. Additionally, campuses covered shortfalls in the Oregon Opportunity Grant program by increasing institutional aid, thereby maintaining affordability to the greatest extent possible. These shortfalls also created a shortened window in which students could apply for the grant, leaving many eligible students without the state need-based aid that may have ensured attendance and persistence.

Accounting for just the additional income taxes that more highly educated Oregonians pay is a strong indicator of the return on investment in raising educational attainment in the state. A 2010 study, Education Pays 2010,[1] states that the median earnings of bachelor’s degree recipients working full-time year-round in 2008 were $55,700, a much higher level of earnings than those of high school graduates, whose median earnings in the same period were $33,800. About $5,900 of the additional $21,900 in earnings of four-year college graduates over high school graduates went to federal, state, and local governments in the form of higher tax payments.

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7. ABOUT THE DATA

Cost of attendance in OUS is derived for each student through FAFSA data. Federal and state grant aid includes federal and state grants, fee remissions, and institution support, excluding loan aid and Federal work study. Student population is restricted to resident undergraduates with a valid FAFSA. The US Census, American Community Survey (ACS), provides median family income data.
1. OUR STRATEGY

Strengthen collaborative efforts with the Oregon Department of Education (ODE) to enhance college preparation and alignment. Streamline matriculation processes to increase participation rates.
2. ABOUT THE TARGETS

Ideal performance on this measure is a steady, manageable increase in first-time freshman enrollment. Enrollment increases must remain in balance with university resources to maintain quality. First-time freshmen enrollment is expected to plateau as the number of Oregon high school graduates decreases.

3. HOW WE ARE DOING

Despite a slight dip fall 2009, OUS enrolled a record 11,778 new first time freshmen in fall 2010, an increase of 2.3% over fall 2009. Fall 2011 and fall 2012 enrollments are more in alignment with that of fall 2008 and fall 2009. OUS expects that the shift in the balance between “traditional” first-time freshmen and “non-traditional” transfer students will likely continue in the next few years due to projected declines in the number of Oregon high school graduates and growth in community college enrollments.

4. HOW WE COMPARE

While there are no national norms for this particular subset of student enrollment, OUS total enrollment growth – including all extended enrollment – continues to outpace national averages, increasing 39.5% since 2000, compared to the average national growth of 31.1% at public 4-year universities between 2000 and 2010 (source: Digest of Education Statistics 2012). The increase in first time freshmen in U.S. 4 year public universities in the 10 years from 2000 to 2010 was 32%, whereas first time freshmen enrollment growth for OUS was 28%, with a 39% overall enrollment growth over the same time period. This higher overall enrollment growth rate for OUS during the same period was largely due to growth in the numbers of new transfer students.

5. FACTORS AFFECTING RESULTS

Myriad factors influence college enrollment including college costs, the availability of need-based financial aid, geographic proximity of postsecondary institutions, state and regional economic outlooks and job markets, and the aspirations of high school graduates and Oregon’s young adults.

6. WHAT NEEDS TO BE DONE
OUS continues to engage in cross-sector alignment initiatives with ODE including dual credit enrollment opportunities for high school students. Additionally, OUS is continuing efforts – in part through GEAR UP and the College Access Challenge Grant – to communicate the importance of a college education for securing a family wage job. The program began in Oregon in 2002 with a six-year grant from the US Department of Education. OUS received a second federal grant in 2008 that supports selected schools through 2014. Beginning in the fall of 2011, ten new districts brought GEAR UP to their schools, thanks to additional funding from The Ford Family Foundation.

7. ABOUT THE DATA

Data are collected in the fourth week of fall term and represent one academic year. Each university provides data along prescribed parameters to a central OUS database; following the implementation of validation programs, enrollment reports are generated for consistent reporting across the system. Additional and disaggregated enrollment data are presented in the OUS Fact Book, available online at www.ous.edu.
II. KEY MEASURE ANALYSIS

KPM #3
COMMUNITY COLLEGE TRANSFERS - Number of students who are new Oregon community college transfers.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Access: Expand access to students who meet admission standards – community college transfers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Context</td>
<td>OBM24 – Some college completion, OBM26 – College completion, OBM11 – Per capita income</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Institutional Research Services, fall fourth-week enrollment reports</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

1. OUR STRATEGY

In collaboration with Oregon community colleges, develop, enhance, and streamline co-enrollment and transfer policies and procedures.
2. ABOUT THE TARGETS

Ideal performance on this measure is a steady, manageable increase in Oregon community college transfer enrollment. Enrollment increases must remain in balance with university resources to maintain quality. Targets predict an increase in transfers resulting from record community college enrollment, with new transfer enrollment flattening out by 2015.

3. HOW WE ARE DOING

Fall 2011 marks the largest number of Oregon community college transfers at 5,125 and 2012 shows only a slight decrease at 5,087—both already surpassing targets set for 2013. The 2011 increase marked the fifth consecutive year of growth in Oregon community college transfers enrolling in OUS.

4. HOW WE COMPARE

While there are no national norms for this particular subset of student enrollment, OUS total enrollment continues to outpace national averages, increasing 39.5% from 2000 to 2010, compared to the average national growth of 31.1% at public 4-year universities during the same time period. (Source: Digest of Education Statistics, 2012)

5. FACTORS AFFECTING RESULTS

Several factors appear to be affecting the recent increase in transfer student enrollment. Efforts to streamline and improve articulation among Oregon’s education agencies to smooth the transition from community college to university appear to be having a positive impact.

6. WHAT NEEDS TO BE DONE

OUS campuses strive to provide access and support for transfer students entering their institutions. House Bill 4059, passed in the 2013 legislative session, requires the State Board of Higher Education to work with community college districts, independent for-profit and independent not-for-profit institutions to “increase the number and type of academic credits accepted for prior learning in institutions of higher education, while ensuring that credit is awarded only for high quality course-level competencies.” OUS continues to work with educational agencies on the following cross sector initiatives in support of transfer activities by offering:

a. Articulated Transfer Linked Audit System (ATLAS)—provides students real time information on how and where completed courses transfer between Oregon institutions;
b. Associate of Arts/Oregon Transfer Degree (AA/OT)—completion of an Oregon Transfer Degree guarantees that a student has fully met all the lower division general education requirements to enter an OUS campus; and
c. Degree Partnership Programs between OUS institutions and Oregon community colleges allow students to be formally enrolled at both a community college and an OUS campus at the same time. Through participation in these programs, students have access to more courses and vital student support at both campuses.
d. Reverse Transfer Agreements and advising that allow students who have transferred from a community college prior to attaining an associate’s degree to be awarded that degree while working toward a baccalaureate degree.

7. ABOUT THE DATA

Data are collected in the fourth week of fall term and represent one academic year. Each university provides data along prescribed parameters to a central OUS database; following the implementation of validation programs, enrollment reports are generated for consistent reporting across the system. Additional and disaggregated enrollment data are presented in the OUS Fact Book, available online at www.ous.edu.
## KPM #4

**FRESHMAN PARTICIPATION** - Oregon freshman participation rate in OUS institutions.

### Goal
Access: Expand access to students who meet admission standards – entering freshmen

### Oregon Context
OBM24 – Some college completion, OBM26 – College completion, OBM11 – Per capita income

### Data Source
(1) OUS Institutional Research Services (2) Oregon Department of Education (3) National Center for Education Statistics

### Owner
OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704

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[Bar chart showing Oregon Freshman Participation Rate in OUS Institutions from 2000 to 2015. Bar is actual, line is target.

Data is represented by number]

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### 1. OUR STRATEGY

Strengthen collaborative efforts with ODE to enhance college preparation and alignment and to streamline application and admission processes.
2. ABOUT THE TARGETS

Ideal performance on this measure is an increasing percentage of Oregon high school graduates who enroll in OUS. 2014 and 2015 targets reflect small declines in the participation rate.

3. HOW WE ARE DOING

The freshman participation rate—representing Oregon high school graduates enrolling in an Oregon public university—spiked at 24.1 in 2001, responding to an increase in state funding during the 1999 session. The participation rate of 19.6 in fall 2012 continued the slight declining trend in participation rates since 2001, while the yearly total number of Oregon high school graduates increased by 16% over the same time period.

4. HOW WE COMPARE

The percentage of Oregon young adults (25-34 years old) who have earned at least a two year degree is lower than the percentage of working adults (25-64 years old) who have earned at least a two-year degree (Lumina 2012). In other words, the next generation of Oregon’s economic leaders is less educated than the current economic and community leaders. For first generation students (defined as students whose parents did not graduate college), the path to a college degree is particularly fraught with challenges and hurdles that result in a significantly lower chance of college attendance and completion (Choy 2001).

5. FACTORS AFFECTING RESULTS

Participation in postsecondary education is influenced by several factors including college costs, the availability of financial aid, state and regional economic outlook and job markets, the aspiration of high school graduates, and family and cultural values and perceptions. Additionally, it is possible that statewide access and alignment efforts could produce greater enrollment of Oregon high school graduates in postsecondary education, but lower OUS participation rates if more students choose to attend community colleges directly out of high school, entering OUS later as transfer students.

6. WHAT NEEDS TO BE DONE
In the current 2013-15 biennium, OUS proposes funding a portfolio of high impact pre-college preparation and outreach practices in collaboration with our K-12 and Community College partners that correlate directly to student success in high school and an increased college-going rate among Oregonians.

Furthermore, as part of Oregon’s agenda increase the rigor of the Oregon diploma and align standards with postsecondary academic requirements, Accelerated Options enable high school students to participate in college-level coursework and earn college credit. All seven OUS institutions offer these opportunities to high school students across the state, and 44% of all newly admitted OUS freshman brought in some form of early college credit in 2011-12. Accelerated Options increase rates of college entry, academic success in college, and college retention rates, and have the potential to keep Oregon’s top performing high school graduates in state. As part of ongoing efforts to improve college preparation, and support students moving through the system to graduation, system and policy leaders see Accelerated Options programs as one of the important and effective strategies necessary to reach the state’s 40-40-20 goals for educational attainment and economic prosperity.

The tuition equity program is another effort to increase the college-going rate among Oregonians. Tuition equity is a term used to describe the provision of in-state tuition to students who are technically “undocumented” based on their parents’ legal residency status. Many of these students have attended some or all of their K-12 education in the U.S., but due to the status of their parents, must pay out-of-state tuition at Oregon University System campuses. House Bill 2787, approved by the 2013 Oregon Legislature and signed into law by Governor John Kitzhaber, allows some of these students to pay in-state tuition, earn a degree, seek legal status, and be able to contribute fully as Oregon taxpayers and citizens.

Finally, the Common Core state standards program—a joint effort with OUS, ODE, and CCWD—helps ensure student success in the transition from high school to college by aligning high school exit and college entrance requirements and curricula.

7. ABOUT THE DATA

The freshman participation rate is the ratio of OUS first-time freshmen from Oregon high schools (regardless of year of graduation) to Oregon high school graduates of the previous school year. The high school graduate population includes private high school graduates and an estimate of graduates who were home schooled. The Oregon Department of Education manages data for Oregon public high school graduates. Data for private high school graduates is provided by the National Center for Education Statistics (NCES) Private School Survey (PPS) and estimated Oregon home school completers is based on K-12 enrollment data from the NCES Common Core of Data (CCD). Participation rates are projected at the time the OUS Factbook is published. Additional data on freshman participation is available in the OUS Fact Book at www.ous.edu.
<table>
<thead>
<tr>
<th>KPM #5</th>
<th>PERSISTENCE - Percent of full-time freshmen who demonstrate progress by returning for the second year.</th>
<th>1997</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td>Quality: Increase quality of undergraduate program – student success</td>
<td></td>
</tr>
<tr>
<td><strong>Oregon Context</strong></td>
<td>OBM26 – College completion, OBM11 – Per capita income</td>
<td></td>
</tr>
<tr>
<td><strong>Data Source</strong></td>
<td>OUS Institutional Research Services</td>
<td></td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
<td></td>
</tr>
</tbody>
</table>

1. **OUR STRATEGY**

Enhance student readiness and fortify early student support programs.
2. ABOUT THE TARGETS

Ideal performance on this measure is increasing percentages of first-time freshmen students returning for a second year. Targets for 2014 and 2015 reflect projected growth in retention resulting from continued successes in new retention strategies.

3. HOW WE ARE DOING

Beginning in 2009 persistence rates increased and have consistently remained at approximately 82% for the past 4 years.

4. HOW WE COMPARE

According to ACT Educational Services (www.act.org), the 2012 OUS persistence rate for freshmen who entered and returned to the same OUS institution for a second year remains well above the national mean rate of 72.2% for public four-year institutions. The persistence rate reported in this KPM is higher, including those students who remain in college, but transfer to another institution within OUS.

5. FACTORS AFFECTING RESULTS

A continuous and systemic focus on improving student retention at both the Board and campus levels appears to be resulting in positive change over time. Adequate academic preparation for college, combined with essential student support services (e.g., freshmen orientation and engagement programs, tutoring, academic advising, early warning programs, faculty and peer mentors) are key components to enhancing persistence and completion rates. OUS institutions develop student programs tailored to their unique student populations. In general, increasing access – particularly to populations with lower historical rates of college participation and preparation – can have a negative impact on persistence and completion. The challenge is to identify and address the needs of these students before and after they enter college.

6. WHAT NEEDS TO BE DONE

All OUS institutions have ongoing programs to recruit, support, retain, and graduate students. OUS’s portfolio of student success projects aims to:
II. KEY MEASURE ANALYSIS

a. improve effectiveness of existing academic policies and services;
b. support early identification of students at risk;
c. provide intentional advising and charting a pathway to degree completion;
d. improve communication;
e. address academic needs of under-prepared students;
f. address financial concerns;
g. ease transition to college using peer mentoring;
h. focus on barriers to success for underrepresented students;
i. make effective use of data;
j. reduce the number of high-failure courses; and
k. manage capacity of programs and course offerings for timely progress to graduation.

In addition to activities outlined by Credit for Prior Learning (HB 4059) and by the Task Force on Higher Education Student and Institutional Success (HB 3418), both outlined in subsequent sections of this report, specific initiatives that each OUS institution is undertaking focused on student retention can be found at http://www.ous.edu/sites/default/files/dept/enrollmentss/RetentionSummary2010.pdf

7. ABOUT THE DATA

Performance data represent the proportion of first-time, full-time freshmen entering an OUS institution one fall and returning to any OUS institution the following fall. Data are reported in the returning year (i.e., persistence rates reported in 2012 represent the fall 2011 cohort returning in fall 2012). The reporting cycle is the academic year.
II. KEY MEASURE ANALYSIS

KPM #6

COMPLETION - Percent of full-time freshmen starting and completing a bachelor's degree at an OUS university (6-year graduation rate).

<table>
<thead>
<tr>
<th>Goal</th>
<th>Quality: Increase quality of undergraduate program – student success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Context</td>
<td>OBM26 – College completion, OBM11 – Per capita income</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Institutional Research Services</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Percent Full-time Freshman Completing Bachelor's Degree within 6 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>55.40</td>
</tr>
<tr>
<td>2001</td>
<td>56.00</td>
</tr>
<tr>
<td>2002</td>
<td>55.50</td>
</tr>
<tr>
<td>2003</td>
<td>57.00</td>
</tr>
<tr>
<td>2004</td>
<td>58.00</td>
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<tr>
<td>2005</td>
<td>58.70</td>
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<tr>
<td>2006</td>
<td>59.00</td>
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<tr>
<td>2007</td>
<td>59.70</td>
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<tr>
<td>2008</td>
<td>59.40</td>
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<tr>
<td>2009</td>
<td>58.90</td>
</tr>
<tr>
<td>2010</td>
<td>60.00</td>
</tr>
<tr>
<td>2011</td>
<td>59.80</td>
</tr>
<tr>
<td>2012</td>
<td>60.50</td>
</tr>
</tbody>
</table>

Bar is actual, line is target

Data is represented by percent

1. OUR STRATEGY

Maintain and strengthen an array of programs and policies to support timely academic progress for all student populations.
2. ABOUT THE TARGETS

A student’s ability to stay in college and complete a degree is based on a number of factors including academic preparation, campus climate, college costs and affordability, family and personal issues, to name a few of the most common. Although the targets for this metric have not changed from 2012, they are 1.2 percentage points above the 10-year average and are a realistic goal for first time freshmen for the next few years.

3. HOW WE ARE DOING

OUS graduation rates have stayed in the 59-60% range for the past eight years. Historically underserved populations such as students of color tend to complete at rates lower than the system average. Graduation rates for African American, American Indian, and Hispanic/Latino students were below the 2011-12 system average of 60.5% at 50.0%, 47.4%, and 52.9%, respectively. The numbers of these underrepresented students graduating with a bachelor’s degree-- as well as students from rural Oregon counties, students who were Pell recipients and students who transferred from Oregon community colleges-- are major components of the Oregon Education Investment Board’s Achievement Compacts and are a focus of attention for both 2-year and 4-year institutions in Oregon.

4. HOW WE COMPARE

Oregon is ranked as the 26th state-at exactly the median- when compared nationally to the 6 year graduation rates of other states, according to the Chronicle of Higher Education. While OUS’ average college completion rate of 54%*is about average when compared to other 4 year universities in the U.S., it is imperative that completion rates improve in order to meet the state’s educational attainment needs by 2025.

* This number is lower than the number reported above, as it does not include students transferring within OUS after initial enrollment

5. FACTORS AFFECTING RESULTS

A number of factors influence student retention and completion, including adequate academic preparation for college, essential support services (e.g., freshmen orientation and engagement programs, tutoring, academic advising, early warning programs, faculty and peer mentors), financial issues, and personal and family events.
Budget constraints limit the number of classes and course selections available, making it more difficult for students to get the classes and support services they need to graduate. This is likely to increase the time it takes students to earn a degree and could potentially cause some students to leave school without completing.

6. WHAT NEEDS TO BE DONE

The Oregon Legislature acknowledged the importance of student success in its 2011 session by passing HB 3418 establishing a Task Force on Higher Education Student & Institutional Success to examine and propose strategies for funding evidence-based, high impact practices that our universities and community colleges could implement to increase student success, retention, and graduation. In its final report in October 2012, the task force made four recommendations to this end:

a. Community colleges, OUS institutions and K-12 districts are challenged to replicate and adapt effective practices without increasing base budgets. The report identifies successful activities and asks that they be examined to determine if they are appropriate methods to improve student success and attain the 40-40-20 goal.

b. Urges the 2013-15 legislature to fund activities outlined in the proposed budgets for OUS, CCWD and OSAC.

c. Identified best practices to increase student success –as indicated by increased completion and graduation rates - and suggests these be turned into standard practices. Achievement Compacts should be used to identify the extent to which these practices have been implemented.

d. Fund research in order to answer critical questions about how financial aid in general, and the Oregon Opportunity Grants in particular, can contribute to increased completion rates and student success.

OUS institutions continue to identify predictors of success and target programs to enhance student completion. System and campus initiatives to improve factors related to affordability, academic alignment (including support for the new Oregon public high school diploma requirements and continued enhancement of Advanced Placement and Dual Credit programs), and academic support services (such as tutoring, writing labs, peer mentoring, and early warning and intervention programs) are being employed. Student exit surveys, designed to identify reasons why students leave, are used within some academic programs and campuses.

7. ABOUT THE DATA

Data represent first time, full-time freshmen entering an OUS university and graduating from any OUS institution within six years (150% of normal time). Students earning an associate’s degree within three years (150% of normal time) and not continuing to obtain a bachelor’s degree are reflected in the graduation rate. Graduation rates for 2011-12 (reported for 2012) reflect progress of students entering OUS in
fall 2006. The reporting cycle is the academic year.
## KPM #7

<table>
<thead>
<tr>
<th>Transfer Student Completion Rate - Percent of college transfers completing a bachelor's degree at an OUS university (4-year graduation rate).</th>
</tr>
</thead>
</table>

### Goal
Quality: Increase quality of undergraduate program – student success

### Oregon Context
OBM26 – College completion, OBM11 – Per capita income

### Data Source
OUS Institutional Research Services

### Owner
OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704

### Chart

![Transfer Student Completion Rate Chart](image-url)

- Bar is actual, line is target
- Data is represented by number

### 1. OUR STRATEGY

Maintain and strengthen an array of programs and policies to support timely academic progress for transfer students.
II. KEY MEASURE ANALYSIS

2. ABOUT THE TARGETS

Ideal performance on this measure is an increase in the percentage of transfer students completing a degree within 4 years or less. Performance decreased slightly in 2012; the targets represent the average of the prior four years of performance.

3. HOW WE ARE DOING

The completion rate for transfer students has seen some shifts in recent years. The 2012 completion rate of 69.5% for this metric closely resembles the 2009 rate and is 2.4 percentage points less than that of the prior year.

4. HOW WE COMPARE

There are no national norms for this measure.

5. FACTORS AFFECTING RESULTS

Although institution variables such as course availability and credit alignment can affect completion rates, student variables such as ability to pay, personal motivation and commitment, and family and employment obligations often have a greater effect on transfer students. To minimize the effect of institution variables on transfers, OUS continues to focus on academic alignment of Oregon’s public postsecondary education sectors and coordinated enrollment processes, as well as renewed attention on student support services.

6. WHAT NEEDS TO BE DONE

OUS and Oregon community colleges continue to streamline general education requirements and eliminate policy and process barriers to college completion. Statewide alignment and academic preparation efforts are underway to ease the transition for students moving between and among Oregon’s educational sectors. Examples of these efforts include the Oregon Transfer Module (OTM), ATLAS (Articulated Transfer Linked Audit System), Degree Partnership Programs and Articulation Agreements between OUS institutions and Oregon community colleges and Credit for Prior Learning (CPL). House Bill 4059 of the 2012 Session of the Oregon Legislature directs the Higher Education Coordinating Commission (HECC) to report on Credit for Prior Learning. To begin the work associated with the bill, a workgroup was formed to identify current status of the goal areas
identified in House Bill 4059, identify next steps for the completion of the legislatively mandated report and to make recommendations for the appointment of the Advisory Committee as required in the bill. Attainment of the goals in HB 4059 will require a multi-year effort. The Committee recommended beginning with additional analysis, planning and coordination in the next year to identify:

a. the current landscape for awarding credit for prior learning;
b. recommendations regarding improvements that can be made in order to develop a transparent system for awarding CPL;
c. the policies and practices than can be developed to ensure consistency as appropriate among all post-secondary institutions; and
d. the factors that may encourage and deter students from seeking CPL.

After completing this analysis, recommendations should be developed and made regarding communication, implementation and sustainability of efforts necessary to meet the goals set forth in HB 4059.

As the community college sector and public 4-year institutions continue collaborative efforts in degree offerings, student attendance patterns within higher education become more varied and complex, it becomes increasingly important to understand enrollment patterns in order to identify and address barriers to transfer and completion. In addition to participation in the National Student Clearinghouse, OUS continues to work with the Office of Community Colleges and Workforce Development (CCWD) to ensure accurate and complete data on transfer students.

7. ABOUT THE DATA

Data represent students entering OUS with 90-134 transfer credits (equivalent to junior standing) and graduating from any OUS institution within four years (150% of normal time). This measure was refined in 2008 to provide a better understanding of transfer students’ progress toward degrees. To allow comparative analysis with the traditional first-time freshman cohort, OUS tracks transfer student cohorts for four years from the point of entry to correlate to the time horizon for the corresponding first-time freshman cohorts. Graduation rates for 2011-12 (reported for 2012) reflect progress of students entering OUS in 2008-09. The reporting cycle is the academic year. Additional data on transfer students are available in the OUS Fact Book, which is available online at www.ous.edu.
### II. KEY MEASURE ANALYSIS

<table>
<thead>
<tr>
<th>KPM #8</th>
<th>TIME TO DEGREE - Average time to degree for students entering as full-time freshmen (years).</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Goal</th>
<th>Quality: Increase quality of undergraduate program – student success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Context</td>
<td>OBM26 – College completion</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Institutional Research Services</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

#### Average Time to Degree for Students Entering as Full-time Freshmen

Bar is actual, line is target

Data is represented by number

### 1. OUR STRATEGY

Maintain and strengthen an array of programs and policies to support timely academic progress for all student populations.
II. KEY MEASURE ANALYSIS

2. ABOUT THE TARGETS

Projected 2014 and 2015 targets expect the metric to decrease to an average of 4.5 years to complete a degree, due to campus retention and graduation efforts, dual credit opportunities, efforts for more seamless credit articulation and credit for prior learning.

3. HOW WE ARE DOING

Average time to degree for 2012 graduates who began as first-time freshmen in 2006 decreased slightly from 2011 but remains approximately 4 years and 2 terms (4.6 years).

4. HOW WE COMPARE

In the 2008-09 Baccalaureate and Beyond Longitudinal Study conducted by NCES, the median time to degree for a 2007-08 first time bachelor’s degree recipients at 4-year public institutions was 55 months or 4.58 years identical to that of OUS institutions in 2012.

5. FACTORS AFFECTING RESULTS

Similar to completion rates, student time to degree is influenced by a variety of academic and personal factors, including academic preparation, availability of required courses, financial issues, and personal and family events. The Task Force on Higher Education Student and Institutional Success that was formed as a result of HB 3418 in the 2011 Legislative session has identified a number of barriers to both student and institution success and has developed a number of recommendations for overcoming these barriers with the ultimate objective of achieving Oregon’s 40-40-20 goal. See http://www.ous.edu/state_board/jointb/sis/meet for more information.

6. WHAT NEEDS TO BE DONE

OUS institutions continue to identify impediments to student progress and implement strategies to become more efficient and effective. One of the HB 3418 Task Force’s recommendations is to fund research capacity in order to answer critical questions about how financial aid in general, and Oregon Opportunity Grants in particular, can contribute to increased completion rates and student success. One initiative currently underway, Accelerated Options, enables high school students to participate in college-level coursework and earn college credit. All seven Oregon University System (OUS) institutions offer these opportunities to high school students across the state, and 44% of all newly admitted OUS freshman brought in some form of early college credit in 2011-12. Accelerated Options increase rates of college entry, academic success in college, college retention rates, decrease time to degree, and have the potential to keep Oregon’s top
performing high school graduates in state. As part of ongoing efforts to improve college preparation, and support students moving through the system to graduation, system and policy leaders see Accelerated Options programs as one of the important and effective strategies necessary to reach the state’s 40-40-20 goals for educational attainment and economic prosperity. The OUS Chancellor’s Office works on behalf of students to expand access to Accelerated Options, ensure that credits earned are consistently applied toward degrees from OUS campuses, and research the effectiveness of these programs on college success.

7. ABOUT THE DATA

The average time to degree is an estimate of the length of time that students take to complete an undergraduate degree, either an associate or bachelor’s degree, from the point at which they began their OUS career. Data reported for 2012 reflect the progress of students entering OUS in 2006-07, consistent with the completion rate cohort reported in KPM 6.
<table>
<thead>
<tr>
<th>KPM #9</th>
<th>TRANSFER STUDENT TIME TO DEGREE - Average time to degree for community college transfers (years).</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td>Quality: Increase quality of undergraduate program – student success</td>
<td></td>
</tr>
<tr>
<td><strong>Oregon Context</strong></td>
<td>OBM26 – College completion</td>
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<td><strong>Data Source</strong></td>
<td>OUS Institutional Research Services</td>
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<tr>
<td><strong>Owner</strong></td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
<td></td>
</tr>
</tbody>
</table>

### Average Time to Degree for Transfer Students

Bar is actual, line is target

Data is represented by number

1. **OUR STRATEGY**

Maintain and strengthen an array of programs and policies to support timely academic progress for transfer students.
2. ABOUT THE TARGETS

Ideal performance on this measure is a decrease in the average time to degree. (The definition of “transfer” student in KPMs 7 and 9 was administratively changed in 2008 to better align with other internal OUS measures). Targets for 2014 and 2015 reflect the historic average for this metric while the performance trend has been on a slight upward trajectory since 2009.

3. HOW WE ARE DOING

Time to degree for students enrolling in OUS with 90-134 credits increased from 2.6 years in 2002 to 2.69 in 2011 and 2012. Transfer students take approximately two years and two terms, on average, to complete their degrees. OUS and individual institutions continue to watch this statistic to determine if alignment efforts are helping students to move efficiently to degree completion.

4. HOW WE COMPARE

There are no national norms for this measure.

5. FACTORS AFFECTING RESULTS

Although institution variables such as course availability and credit alignment can affect time to degree, student variables such as financial ability to pay, personal motivation and commitment, and family and employment obligations often have a greater effect on transfer students. To minimize the effect of institution variables on transfers, OUS continues to focus on academic alignment of Oregon’s public postsecondary sectors and coordinated enrollment processes, as well as renewing their attention to student support services.

6. WHAT NEEDS TO BE DONE

OUS partners with community colleges and high schools to make getting degrees faster and easier for students. Students’ transfer process from community colleges is simplified with transfer degrees, dual enrollment options, new reverse transfer degrees, applied Baccalaureate and others. Alignment and academic preparation efforts like the Associate of Arts/Oregon Transfer Degree (AA/OT), the Oregon Transfer Module (OTM), and ATLAS (Articulated Transfer Linked Audit System) aim to ease the transition for students moving between and among Oregon’s educational sectors.
House Bill 4059, passed by the 2012 Oregon Legislature, directs the Higher Education Coordinating Commission (HECC) to expand and improve access to Credit for Prior Learning. One of the goals for the bill was to “increase the number of students who receive academic credit for prior learning…, while ensuring that credit is awarded only for high quality course-level competencies.” Partnerships with K-12 include dual credit and aligned academic standards between high schools and OUS to lower tuition costs, and ensure more students are ready to succeed in college.

As student attendance patterns become more varied and complex, it is increasingly important to understand enrollment trends in order to identify and address barriers to transfer and completion. In addition to participation in the National Student Clearinghouse, OUS continues to work with CCWD to ensure accurate and complete data on transfer students.

7. ABOUT THE DATA

The average time to degree for transfer students is an estimate of the length of time that students transferring with 90-134 credits take to complete an undergraduate degree. This measure was administratively refined in 2008 to allow comparative analysis with the traditional first-time freshman cohort. Transfer students in this measure are defined as students transferring to OUS with the equivalent of junior standing. Data reported for 2012 reflect the progress of transfer students entering OUS in 2008, consistent with the cohort reported in KPM 7.
## KPM #10

**GRADUATE SATISFACTION** - Average rating of overall quality of experience by recent OUS bachelor's graduates (5-pt scale)  

<table>
<thead>
<tr>
<th>Goal</th>
<th>Quality: Increase quality of existing programs – customers’ views</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Context</td>
<td>Academic excellence; OBM26 – College completion</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Performance Measurement and Surveys, Survey of OUS Bachelor’s Graduates</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

![Graduate Satisfaction Graph](image)

**Data is represented by number**

### 1. OUR STRATEGY

Continue to nurture educational quality in all academic programs and strengthen student support services.
2. ABOUT THE TARGETS

Ideal performance aims for consistently high assessments by recent graduates.

3. HOW WE ARE DOING

This measure reports the perceptions held by recent OUS graduates regarding the overall quality of their educational experience, including their assessment of the university’s contribution to their development in key academic areas and preparation for employment and/or advanced educational opportunities. OUS bachelor’s degree recipients from the class of 2007 expressed high levels of satisfaction with the quality of their education, producing a mean rating of 4.2 on a 5-point scale in which 1 is “poor” and 5 is “excellent.” The mean rating has increased over the past two assessment periods from 4.0 among the class of 2003 to a high of 4.2 among 2007 graduates. No data were available for the class of 2009 or 2011, due to budget and staff reductions in the OUS Chancellor’s Office, but will be available for the class of 2012 in the 2013-14 academic year.

4. HOW WE COMPARE

There are no national standards against which to assess OUS performance on this measure.

5. FACTORS AFFECTING RESULTS

OUS institutions strive to create a stimulating and supportive educational environment. While each campus designs programs and initiatives reflective of its particular student population, all of these seek to enhance intellectual rigor and academic richness, integrate living and learning opportunities, connect students to communities and workplaces outside the campus environment, provide a multi-faceted network of student support services, and create a healthy and respectful culture of learning.

6. WHAT NEEDS TO BE DONE

As Oregon’s public universities seek to increase access and continue to work on alignment across education sectors, monitoring graduate satisfaction remains a priority. In times of diminished resources, important academic and non-academic student support services are reduced as administrative functions are cut to preserve instruction and course availability. The challenge is quickly identifying where students are experiencing dissatisfaction and employing available resources to make adjustments.
7. ABOUT THE DATA

Graduate satisfaction data are obtained through a biennial survey of recent bachelor's graduates, collected approximately one year following graduation. In addition to an overall quality rating, graduates also provide satisfaction ratings about key academic supports and the contribution of an OUS institution to their development of skills and competencies. Staff and budget reductions within the Chancellor’s Office forced the suspension of survey activity conducted by the Chancellor’s Office. As a result, data for the class of 2009 or 2011 are not available. New survey implementation is underway for the class of 2012 Bachelor’s Degree recipients, one year after graduation. Complete reports of earlier surveys are available on the OUS website at www.ous.edu.
### II. KEY MEASURE ANALYSIS

<table>
<thead>
<tr>
<th>KPM #11</th>
<th>STUDENT/FACULTY RATIO - Ratio of students to full-time faculty.</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td>Quality: Increase quality of undergraduate program – student success</td>
<td></td>
</tr>
<tr>
<td><strong>Oregon Context</strong></td>
<td>Academic excellence; OBM26 – College completion</td>
<td></td>
</tr>
<tr>
<td><strong>Data Source</strong></td>
<td>OUS Institutional Research Services, National Center for Education Statistics-- IPEDS Reports</td>
<td></td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
<td></td>
</tr>
</tbody>
</table>

![Student to Full-Time Faculty Ratio](image)

**Bar is actual, line is target**

*Data is represented by number*

1. **OUR STRATEGY**

Continue to support the recruitment and retention of full-time faculty.
2. ABOUT THE TARGETS

Ideal performance on this measure is a declining ratio of students to full-time instructional faculty. A target of 25.0 for 2014 reflects OUS’ goal to improve the student/faculty ratio despite the current budget situation.

3. HOW WE ARE DOING

The OUS ratio of students to full-time faculty decreased from 26.8 in fall 2011 to 24.2 in fall 2012. The increases in the previous three years were in response to record enrollment growth. The decrease in the current ratio of 24.2 to 1 for fall 2012 is due primarily to changes in the definition of teaching faculty, especially at OSU. Targets were set prior to the change in definition.

4. HOW WE COMPARE

Most OUS institutions have a higher student to full-time faculty ratio when compared to their designated peer institutions. For example, peers for OUS research universities had a fall 2011 average ratio of 18.6 to 1, while comparator institutions for OUS regional universities report a fall 2011 average ratio of 23.5 to 1.

5. FACTORS AFFECTING RESULTS

Trends in student enrollment and the number of full-time instructional faculty affect this measure. The ratio of students to full-time faculty is an indirect indicator of instructional quality and student support, contributing to students’ ability to achieve their educational goals. Increasing enrollments coupled with reductions in OUS general funds has adversely affected faculty recruitment, forcing many OUS campuses to rely heavily on part-time instructional faculty.

6. WHAT NEEDS TO BE DONE

Universities are challenged to maintain a balance that preserves instructional and program quality while employing resources in the most cost-effective way. Lower student/faculty ratios allow faculty to provide more time for mentoring and advising, more engaging learning
environments, more time for student research, and ultimately, improved student completion and success. At the campus and system levels, efforts continue to enhance faculty recruitment and retention, explore and broaden instructional methods that effectively employ technology while monitoring student satisfaction and academic achievement.

7. ABOUT THE DATA

This measure represents the ratio of fall FTE enrollment (calculated as full-time headcount plus one-third of part-time headcount) to full-time faculty headcounts, as reported in IPEDS (Integrated Postsecondary Education Data System) to the National Center for Education Statistics. Data for 2012 represent fall term of the 2012-13 academic year.
### KPM #12

**INTERNSHIPS - Percent of bachelor's graduates completing an OUS-approved internship.**

<table>
<thead>
<tr>
<th>Goal</th>
<th>State economic development: Employability of graduates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Context</td>
<td>OBM26 – College completion</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Performance Measurement and Surveys, Survey of OUS Bachelor’s Graduates</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

#### 1. OUR STRATEGY

Through employer contacts and student mentoring, continue to develop, support, and encourage experiential learning opportunities and participation.
2. ABOUT THE TARGETS

Ideal performance on this measure is an increasing number of OUS students engaging in experiential learning. In 2005, a revised survey question for collecting data regarding internships and applied learning was implemented and has resulted in data that are more reliable. This adjustment to the data collection methodology is responsible for the dramatic increase in targets beginning in 2007.

3. HOW WE ARE DOING

Among graduates of the class of 2007, 90% reported participating in at least one form of experiential learning. Students also experienced hands-on learning through participation in study abroad programs (16% of graduates) and the National Student Exchange (completed by 2% of graduates). Approximately 34% of OUS graduates indicated that participation in an experiential learning program led directly to their current employment. No data were available for the class of 2009 or 2011, due to budget and staff reductions in the OUS Chancellor’s Office, but will be available for the class of 2012 in the 2013-14 academic year. Figures in 2005 and 2007 are higher than those reported among previous graduating classes but comparisons are invalid due to changes to the survey instrument.

4. HOW WE COMPARE

There are no national norms for this measure.

5. FACTORS AFFECTING RESULTS

Hands-on learning opportunities have become increasingly popular as faculty recognize their impact on student learning and students see their relevance to future goals. However, these programs require additional time and support on the part of faculty and staff, and are undermined by cuts to administrative and student support services.

6. WHAT NEEDS TO BE DONE

OUS works with university and business leaders in the state to identify the attributes that make an internship experience valuable to both the student and future employer. Experiential learning is practiced in all OUS institutions. Whether a traditional internship, international
experience, or community service event, students are challenged to put their classroom experience to work in a real world context. OUS is continuing efforts to accurately identify and tabulate student participation in this important aspect of student learning and graduate employability.

7. ABOUT THE DATA

Data for this measure are obtained through a biennial survey of recent bachelor’s graduates, collected approximately one year following graduation. Graduates are queried on their participation in a variety of experiential learning exercises including internships, clinical or student teaching experience, fieldwork, practica, capstone projects, and community service learning opportunities. Staff and budget reductions within the Chancellor’s Office forced the suspension of survey activity conducted by the Chancellor’s Office. As a result, data for the class of or 2011 are not available. New survey implementation is underway for the class of 2012 Bachelor’s Degree recipients, one year after graduation. Complete reports of earlier surveys are available on the OUS website at www.ous.edu.
### II. KEY MEASURE ANALYSIS

<table>
<thead>
<tr>
<th>KPM #13</th>
<th>GRADUATE SUCCESS - Percent of graduates employed and/or continuing education.</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td>State economic development: Employability of graduates</td>
<td></td>
</tr>
<tr>
<td><strong>Oregon Context</strong></td>
<td>OBM26 – College completion</td>
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<td><strong>Data Source</strong></td>
<td>OUS Performance Measurement and Surveys, Survey of OUS Bachelor’s Graduates</td>
<td></td>
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<tr>
<td><strong>Owner</strong></td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
<td></td>
</tr>
</tbody>
</table>

#### Graduate Success

Data is represented by percent

Bar is actual, line is target

Graduate Success

<table>
<thead>
<tr>
<th>Year</th>
<th>Graduates Employed/Continuing Education</th>
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<tbody>
<tr>
<td>2001</td>
<td>93</td>
</tr>
<tr>
<td>2003</td>
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<tr>
<td>2005</td>
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<tr>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
</tr>
</tbody>
</table>

**1. OUR STRATEGY**

Maintain academic standards for critical learning outcomes and foster alignment with workforce and civic needs and expectations.
2. ABOUT THE TARGETS

Ideal performance on this measure maintains a high level of graduates who are employed and/or enrolled. A realistic assessment of economic projections in the state resulting from the recession suggests lower performance in the near future.

3. HOW WE ARE DOING

This measure reports the percentage of OUS bachelor’s degree recipients who are employed and/or continuing their education approximately one year following their graduation. This percentage dropped with the class of 2007 to 92%, down 1 percentage point from the class of 2005. Although the proportion of graduates employed remained the same between the two classes, the number of 2007 graduates continuing their education dropped. This percentage is notably higher than the 88% reported in 2003 following the economic downturn early in the decade.

The recent economic recession and accompanying unemployment rates – as of June 2011 Oregon’s unemployment rate was 9.4% – have undoubtedly affected recent graduate success and are likely a factor in increasing OUS graduate enrollments. No data are available for the class of 2009 or 2011 due to the suspension of the source survey because of budget and staff reductions in the Chancellor’s Office, but will be available for the class of 2012 during the 2013-14 academic year.

4. HOW WE COMPARE

The proportion of graduates who were actively but unsuccessfully seeking work was 3.4% for the class of 2007, lower than the state unemployment rate of 6.0% in June of 2008, one year following graduation for the majority of students.

5. FACTORS AFFECTING RESULTS

The employment success of graduates is dependent on the vitality of the economy and the availability of jobs for recent degree recipients, as well as the alignment of workforce needs and expectations, curricula, faculty mentoring, research and internship opportunities, and students’ personal goals. Each OUS institution strives to prepare graduates with the skills and knowledge needed for successful job placement, advanced educational programs, and responsible engagement with their local and global communities.

6. WHAT NEEDS TO BE DONE
OUS must maintain academic quality and support rigorous standards of student learning to ensure that graduates are competitive in their preparation for graduate programs and the job market. Students’ engagement in applied learning experiences (KPM 12) and other high impact practices contributes to their academic and intellectual development. OUS institutions should strive to maintain the effectiveness of student career services despite recent cuts in state appropriations. Career service centers offer many programs for students to gain an effective edge in their job searches. Writing workshops designed to help students create an effective resume and on-campus job fairs are a couple of ways that career centers support university students in their transition from campus to the workforce.

7. ABOUT THE DATA

This measure reports the percentage of recent OUS bachelor’s degree recipients who are employed and/or continuing their education approximately one year following graduation. Data on graduate success are obtained through a biennial survey of recent bachelor’s graduates, collected approximately one year following graduation. Staff and budget reductions within the Chancellor’s Office forced the suspension of survey activity conducted by the Chancellor’s Office. As a result, data for the class of 2009 or 2011 are not available. New survey implementation is underway for the class of 2012 Bachelor’s Degree recipients, one year after graduation. Complete reports of earlier surveys are available on the OUS website at www.ous.edu.
II. KEY MEASURE ANALYSIS

<table>
<thead>
<tr>
<th>KPM #14</th>
<th>EMPLOYED IN OREGON - Percent of employed graduates working in Oregon.</th>
<th>2003</th>
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</thead>
<tbody>
<tr>
<td>Goal</td>
<td>State economic development: Employability of graduates</td>
<td></td>
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<tr>
<td>Oregon Context</td>
<td>OBM26 – College completion; OBM4 – Net job growth</td>
<td></td>
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<tr>
<td>Data Source</td>
<td>OUS Performance Measurement and Surveys, Survey of OUS Bachelor’s Graduates</td>
<td></td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
<td></td>
</tr>
</tbody>
</table>

1. OUR STRATEGY

Maintain academic standards for critical learning outcomes and foster alignment with workforce needs in Oregon.
2. ABOUT THE TARGETS

Ideal performance on this measure shows high percentages of OUS bachelor's graduates employed in Oregon. A realistic assessment of economic projections in the state suggests lower percentages of graduates finding employment in Oregon in the near future.

3. HOW WE ARE DOING

In 2005 and 2007, the percentage of employed graduates working in Oregon fell below the target of 80%. While the percentage of graduates employed and/or enrolled following graduation (Graduate Success KPM 13) strengthened mid-decade, greater proportions of those motivated and successful graduates chose to leave the state for employment.

The recent economic recession and accompanying unemployment rates – as of June 2011 Oregon’s unemployment rate was 9.4% – have undoubtedly affected recent graduate success and the percent of employed graduates choosing to seek work in Oregon. No data are available for the class of 2009 or 2011 due to the suspension of the source survey because of budget and staff reductions in the Chancellor’s Office, but will be available for the class of 2012 during the 2013-14 academic year.

4. HOW WE COMPARE

There are no standards or comparisons available for this measure.

5. FACTORS AFFECTING RESULTS

The migration of recent college graduates is impacted by a number of factors including job opportunities in particular fields, unemployment rates, and salary options. Among 2007 graduates who are employed outside Oregon, the most common reasons cited for leaving Oregon were more job opportunities, moving closer to family, and better salary options. Other reasons include quality of life, relocation by an employer, returning to a home state or country, military service, and weather.

6. WHAT NEEDS TO BE DONE

OUS campuses work directly with Oregon companies to help ensure that curricula are in line with industry practices and future needs. This type of responsive degree planning helps to produce OUS graduates who transition effectively between their educational and professional careers. Campus career centers also represent a valuable link between OUS graduates and Oregon industry. Additional analyses could
explore whether OUS graduates are finding employment in the existing and emerging industry clusters identified as critical to Oregon’s workforce development strategies.

7. ABOUT THE DATA

Data on graduate success and employment in Oregon are obtained through a biennial survey of recent bachelor’s graduates, collected approximately one year following graduation. Staff and budget reductions within the Chancellor’s Office forced the suspension of survey activity conducted by the Chancellor’s Office. As a result, data for the class of or 2011 are not available. New survey implementation is underway for the class of 2012 Bachelor’s Degree recipients, one year after graduation. Complete reports of earlier surveys are available on the OUS website at www.ous.edu.
1. OUR STRATEGY

Promote policies and programs that increase student access, facilitate student progress, and ensure academic quality at the undergraduate level.
2. ABOUT THE TARGETS

Ideal performance on this measure is an increase in the number of bachelor’s degree awards. Targets see an increasing trend due to recent enrollment and retention gains.

3. HOW WE ARE DOING

Total OUS degrees awarded reached record levels in 2011-12 with the award of 20,209 degrees, an 8% increase over 2010-11 and a 32% increase from 10 years ago. Baccalaureate awards, which account for the largest proportion of earned degrees (76%), increased by 1,566 awards, or 11.2% over 2010-11. As record high number of graduates departed the campuses this past June, the enrollment increase was slightly lower than in recent years. OUS saw especially high enrollment increases between 2007 and 2012, as more students pursued college to earn degrees and increase career skills during the economic downturn.

4. HOW WE COMPARE

While there are no national norms to suggest what performance on this measure should be, according to the US Census Bureau’s 2011 American Community Survey (ACS) 1-year estimates, Oregon’s educational rate – the percent of population 18-24 who have completed a bachelor’s degree – is 26.4%, slightly higher than the national average of 22.1%. Degree projections through 2015 are derived from enrollment projections assuming a consistent ratio of senior and post baccalaureate undergraduates to degrees awarded. The 40-40-20 goal for 2025 is to reach a milestone of 40% of the adult population in Oregon with a bachelor’s degree or higher. While degree attainment of Oregonians is the primary goal, the inclusion of degrees awarded to non residents more fully reflects the true benefit to the state. Non resident degree recipients contribute to the local economy during their college tenure and many remain in the state, bolstering Oregon’s workforce.

5. FACTORS AFFECTING RESULTS

Trends in student access and affordability have a great effect on degree production. Campuses have responded to the increased tuition
rates for students with cost-saving and efficiency measures, increasing donor-funded campus aid, leveraging state and federal aid, and numerous other strategies. The passage of SB 242 also allowed the System increased financial agility, enabling campuses to invest more in students with savings achieved through new efficiencies. Stable state funding will enable the universities to keep tuition increases moderate over time, especially important in Oregon, which has relatively low average per-capita income levels. Access is increasingly being challenged by limited funding, changing demographics, and limited availability of higher education programs in certain parts of the state where expanding access for underserved populations and regions must be a priority. Increasing retention and graduation rates, as well as increasing numbers of community college transfers are strong contributors to the increasing number of bachelor’s degrees.

[1] 42nd Annual Survey Report on State-Sponsored Student Financial Aid, National Association of State Student Grant and Aid Programs (NASGAP), Table 12, Estimated Undergraduate Grant Dollars per Undergraduate Enrollment, by State, 2010-11 academic year.

6. WHAT NEEDS TO BE DONE

Oregon’s education system is moving towards outcomes—degrees and successful graduates—as a way to measure student and statewide success. The OUS Achievement Compacts include reporting and goals for 8 outcome measures in the areas of completion, quality, and connections with other education sectors. Each measure is reported for all Oregon students, for underrepresented minority Oregon students, and for economically disadvantaged Oregonians. The ultimate outcome of increased enrollment over time is an increased number of degrees attained by OUS students.

In addition to the retention initiatives mentioned in KPM 5, the following example represent a small subset of activities that highlight the range and types of programs that Oregon’s public universities are engaged in to increase the state’s educational attainment levels and to help realize the 40-40-20 goal set forth for 2025.

Re-engaging citizens: The OUS has a number of effective, innovative programs that help students stay in college and complete a degree. In particular, there are a large number of adults who have some college but, for various reasons, have not been able to complete a degree. Portland State University, in collaboration with community colleges in the greater Portland Metropolitan region, has developed degree completion programs to serve these students. The programs build on the previous higher education experience of the student and the lower division offerings at the community college to provide the final two years of a Bachelor’s degree.

Keeping students enrolled: Sometimes due to lack of academic preparedness or other life factors, students struggle in their first year at a university. These students often become discouraged, leave college, and do not return. In order to increase the number of college graduates and achieve 40-40-20, Southern Oregon University has created a program for students with a focus on study skills, time management, reading comprehension, and campus resources. SOU offers these courses in the winter and spring terms at a time when students need them to get back on track, providing them with the assistance they need to prevent them from dropping out.

Academic advising: Research shows that providing timely and appropriate advising to students helps them to complete their studies, attain their degree in a shorter amount of time (saving them tuition dollars) and improve retention. Western Oregon University has created an...
Academic Advising and Learning Center that provides mandatory advising for all undergraduate students with required regular meetings. Once a major is declared, every student is assigned a faculty advisor. Advising staff members are multilingual, providing access to the three most prominent languages of Oregon students: English, Spanish, and Russian. Overlapping advising is provided for first-generation and low-income students as well as students with disabilities who need additional support.

Articulation agreements: Creating a postsecondary pathway for students to transition from high school and community college to a university is critical to achieving 40-40-20. Oregon Institute of Technology has created an office of Academic Agreements to create greater access for high school students, community college students and practicing professionals to its programs. The Office’s charge is to manage over 100 articulation and dual enrollment agreements, direct OIT’s extensive Advanced Credit Program and High School Transitions programs, and represent the campus on the pathways work with community colleges. Eastern Oregon University offers co-enrollment, bridge, and completion program opportunities to Oregon students with neighboring community colleges as well as across the state through their 16 Regional Centers. EOU also offers an array of distance education programs to create a strong and unique ladder of opportunity for students throughout Oregon.

Affordability: In order to achieve 40-40-20 there must be opportunities and support for academically qualified Oregon citizens who cannot afford a college. University of Oregon started the “Pathway Oregon” program to ensure that academically qualified, lower-income Oregonians have their tuition and fees covered with a combination of federal, state, and university funds. The highest achieving students in the program have the opportunity to be selected for a grant to cover housing costs as well. Students in this program receive targeted orientation and advising throughout their UO career. At present, there are 1,100 students in the program—many of them first generation, students of color, and from rural areas.

Providing readily accessible decision making tools: Students benefit greatly when there are tools they can use that enhance the personal advising they are already receiving. Oregon State University is using one such tool, MyDegrees Degree Audit, which allows students the ability at any time to review their progress toward degree, model possible scenarios for courses yet to be taken, and look at the classes they need if they choose to change their major.

7. ABOUT THE DATA

Bachelor’s degrees counted for an academic year are those awarded summer term through the following spring term, which approximates the fiscal year. Students who earn a single degree with more than one major are only counted once in these data. Data are reported to IPEDS (Integrated Postsecondary Education Data System) in an annual Completions Survey report. Additional information on degrees awarded within OUS, including breakouts by institution, degree level, and major are reported in the OUS Fact Book and available online at [www.ous.edu](http://www.ous.edu).
II. KEY MEASURE ANALYSIS

KPM #16  ADVANCED DEGREES - Total number of advanced degrees granted (master's, doctoral, and professional).

<table>
<thead>
<tr>
<th>Goal</th>
<th>State economic development: Employability of graduates; Student success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Context</td>
<td>OBM26 – College completion</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Institutional Research Services, National Center for Education Statistics - IPEDS Reports</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

1. OUR STRATEGY

Increase the number of graduate students entering and completing advanced degrees at OUS institutions through internationally respected programs and faculty, facility development, and strong support for graduate students.
2. ABOUT THE TARGETS

Ideal performance on this measure is an increase in the number of graduate students earning advanced degrees. Targets for 2014 and 2015 reflect modest decreases in advanced degrees following recent decreases to graduate program enrollment.

3. HOW WE ARE DOING

Total advanced degrees decreased by 1% in 2011-12, the first year of decrease in the last five. Master’s degree awards were the greatest driver of this with a 2.5% decrease over the previous year while doctoral awards actually increased by 16%. Graduate student enrollment decreased 1.8% to 15,899 students in fall 2012, compared to 16,190 students in fall 2011, though doctoral enrollment grew 4.1%.

4. HOW WE COMPARE

While there are no national norms to suggest what performance on this measure should be, according to the US Census Bureau’s 2011 American Community Survey (ACS), 10.9% of Oregon’s population hold a graduate degree, compared to the U.S. average of 10.6%.

5. FACTORS AFFECTING RESULTS

Master’s programs take typically one to two years to complete and degree production is sensitive to fluctuations in enrollment. Doctoral programs, however, range between four and eight years from entering to completion and comprise a smaller number of the total number of graduate degrees awarded. Rising tuition, reduced employer support, fewer fellowships, and fewer good jobs for graduate degree recipients are four national trends that pose financial hurdles to anyone considering graduate school. Faculty research and the corresponding grants and contracts strongly influence this measure as well as reductions in state appropriation that may challenge OUS’s ability to recruit and retain the high caliber faculty necessary for strong graduate programs.

6. WHAT NEEDS TO BE DONE
Oregon’s ability to compete globally requires a solid foundation of strong graduate programs and advanced degree production. Oregon’s competitiveness has eroded over the past decade from diminished state resources. Oregon needs to reinvest in its graduate programs to remain competitive in the academic marketplace. Investments in faculty recruitment and retention, coupled with investment in graduate programs and students are essential to increase advanced degree awards.

OUS has approved new advanced degree programs in response to Oregon’s workforce needs. Advanced degree programs in selected fields like healthcare and engineering build research and development capacity for Oregon’s industries and universities. Through the Engineering and Technology Industry Council (ETIC), the OUS Research Council, and the Oregon Innovation Council (Oregon InC), OUS is working with Oregon communities and private industries to identify state needs for professionals with advanced skills and credentials to provide talent for existing and emerging industry clusters.

7. ABOUT THE DATA

Advanced degrees include master’s, doctoral, and first professional degrees, counted for an academic year and awarded summer term through the following spring term, which approximates the fiscal year. Data are reported to IPEDS (Integrated Postsecondary Education Data System) in an annual Completions Survey report. Additional information on degrees awarded within OUS, including breakouts by institution, degree level, and major are reported in the OUS Fact Book and available online at www.ous.edu.
### II. KEY MEASURE ANALYSIS

<table>
<thead>
<tr>
<th>KPM #17</th>
<th>ENGINEERING AND COMPUTER SCIENCE DEGREES - Total number of degrees granted in engineering and computer sciences (all levels; includes multiple majors).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>State economic development: Employability of graduates</td>
</tr>
<tr>
<td>Oregon Context</td>
<td>OBM26 – College completion</td>
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<td>Data Source</td>
<td>OUS Institutional Research Services</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

#### 1. OUR STRATEGY

Build on ETIC achievements by further enhancing program quality and capacity, strengthening industry connections, and pursuing private investment.

---

Data is represented by number.
2. ABOUT THE TARGETS

Ideal performance on this measure is an increase in the number of degree awards in these fields. Increases in 2014 and 2015 degree production targets reflect a projected increase to degrees awarded in computer science and engineering as a result of recent enrollment increases in those programs.

3. HOW WE ARE DOING

ETIC is a key example of the OUS’s partnership with the private sector to meet statewide goals of making engineering and technology education a strategic resource fueling Oregon's high tech and other sectors that use technology, including agriculture, healthcare, forestry, electronics, utilities, and retail. The membership of ETIC is made up of executives representing a wide variety of industries from throughout Oregon as well as leadership from Oregon universities.

Engineering and computer science degree awards have had four consecutive years of rapid growth, increasing 12.6% from 2010 to 2011 and 6.6% in the last year to 1,750 degrees in 2012. Earlier this decade, computer science and engineering programs (particularly those related to computer technologies) experienced sharp declines in enrollment following the dot-com bust. Renewed interest in engineering programs has resulted in recent enrollment increases and will likely increase degree production in the future.

ETIC investments have led to increases in private support, enrollment, degrees, and externally funded research. Private support grew from $7.1 million in the biennium ending June 1999 to over $45 million in the biennium ending June 2011. Degrees awarded have increased over 55% at the bachelor’s, master’s and doctoral level since the ETIC base-line year of 1999. Externally funded research has increased from $30 million in 1999 to over $82 million per year in 2012.

4. HOW WE COMPARE

Nationally, the population 25 years and over with a Bachelor's degree or higher attainment in science and engineering related fields have increased from 5.5 million in 2009 to 5.7 million in 2011, an increase of 6.6% (2009 and 2011 American Community Survey, US Census).

5. FACTORS AFFECTING RESULTS
Increasing the degrees granted in engineering and computer science is a key goal of the Engineering and Technology Industry Council (ETIC). Factors leading to increases include investments in pre-engineering programs in K-12 schools and hiring additional faculty that allow more diverse and more frequent course offerings. OUS and ETIC support grant opportunities for Oregon K-12 schools to implement pre-engineering programs and activities for students. One example of a pre-engineering program is eCHAMP, which helps to fund coaches and mentors to support engineering and technology youth teams modeled after athletic teams.

6. WHAT NEEDS TO BE DONE

ETIC investments have allowed participating campuses to increase their education and research offerings, bringing opportunities to Oregon residents and the access to talent and innovation needed by Oregon companies to produce jobs in a globally competitive economy. ETIC uses objective metrics to set goals and measure progress toward the goals. These goals are focused on producing STEM graduates in the areas most needed by Oregon’s trade-sector industries. Achieving these goals will allow Oregon’s economy to create new jobs at the same time it raises the average income to meet and exceed the national average. In addition, ETIC’s focus on investing in and raising the quality of successful programs will allow students to achieve their desired outcome of an education that supports rewarding careers.

7. ABOUT THE DATA

The measure reports associate’s, bachelor’s, master’s, and doctoral degrees awarded in CIP codes 11 (computer and information science), 14 (engineering), and 15 (engineering technologies). The Classification of Instructional Programs code system was developed by the National Center for Education Statistics to facilitate program comparisons among institutions. Degrees are counted for an academic year and awarded summer term through the following spring term, which approximates the fiscal year. Students who earn a single degree with a double major are counted twice if both majors are within the appropriate CIP codes. Data are reported to IPEDS (Integrated Postsecondary Education Data System) in an annual Completions Survey report. Additional information on degrees awarded within OUS, including breakouts by institution, degree level, and major are reported in the OUS Fact Book, available online at www.ous.edu.
# OREGON UNIVERSITY SYSTEM

## II. KEY MEASURE ANALYSIS

<table>
<thead>
<tr>
<th>KPM #18</th>
<th>SPONSORED RESEARCH - Total sponsored research and development dollars supported by external fund sources ($ in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>a) Total, b) Federal sources, c) Private sources.</td>
</tr>
</tbody>
</table>

**Goal**

Quality: Increase quality and external resources for research and scholarship programs

**Oregon Context**

OBM7b – Research and development (academia)

**Data Source**

OUS Controller’s Office, Annual Financial Reports

**Owner**

OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704

### Total Sponsored Research and Development Dollars Supported by External Fund Sources (mil)

<table>
<thead>
<tr>
<th>Year</th>
<th>Data is represented by currency</th>
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<tbody>
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<td>2014</td>
<td>351</td>
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<tr>
<td>2015</td>
<td>380</td>
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</tbody>
</table>

### 1. OUR STRATEGY

Attract and retain internationally recognized faculty, increase graduate education, and enhance strategic research partnerships via intercampus and interdisciplinary collaborations.
2. ABOUT THE TARGETS

Ideal performance on this measure is increasing research expenditures. Targets for 2014 and 2015 reflect the projected decreasing increasing trend in sponsored research expenditures due in large part to sequestration of federal research dollars.

3. HOW WE ARE DOING

Overall, total sponsored research in OUS increased significantly over the decade, growing 73% since FY 2002, from a total of $241 million to $418 million in FY 2012. In the past year, however, sponsored research expenditures decreased by about $25 million. Nearly all of OUS sponsored activities (97% in FY 2013) are funded by sources other than state dollars. These monies provide a substantial economic impact in Oregon by attracting money from outside the state.

4. HOW WE COMPARE

Oregon’s public university faculty members are among the most successful in the country at earning federal support for their research and discoveries. In fact, Oregon’s public universities[1] are the 7th highest in the nation in federal research funding per faculty member. OUS total sponsored research and other sponsored activities’ expenditures reached a record high of $418 million in fiscal year 2012, an increase of 74% since FY 2002.

[1]Ranking includes all OUS institutions and OHSU

5. FACTORS AFFECTING RESULTS

Federal Budget cuts went into effect in March 2013, after congress was unable to reach a budget deal to reduce the federal deficit. Federal sequestration reduces Federal spending by $85 billion in FY 2013 and effects a broad range of domestic spending, including spending on National Institutes of Health, the National Science Foundation, US Department of Agriculture, US Department of Energy, and other large federal agencies that funnel research dollars to faculty and students at universities nationwide.

A successful research enterprise is also dependent on competitive faculty and strong graduate programs. Sponsored research awards are based on a competitive process and demonstrate the expertise and entrepreneurial spirit of faculty members. OUS competes in a national market to attract and retain expert faculty and graduate students. Below average faculty salaries make it difficult to compete for the best
faculty, a problem exacerbated as faculty members retire or leave for better paying positions elsewhere.

6. WHAT NEEDS TO BE DONE

These funds are invested at each campus to provide core shared facilities and services that enable research activity across broad groups on campus. The funds also sustain key research centers and institutes that coordinate groups of faculty to pursue large funding opportunities from agencies like the National Science Foundation and the National Institutes of Health. Every campus augments these funds at least 3:1 to support the research infrastructure of the campus.

The Board of Higher Education recognizes that the research mission of Oregon's public universities is integral to teaching and student learning, and the innovations resulting from OUS’s research work are a keystone for economic success for Oregon. The OUS Academic Strategies division monitors and reports research performance results annually to the Board, the Oregon Education Investment Board, campus communities, the Legislature, and the public. OUS research metrics include total grant and contract expenditures, expenditures per full-time faculty, inventions disclosed, licensing revenue generated, and start-up companies formed.

7. ABOUT THE DATA

Data represent expenditures for sponsored research and other activities using grant funds from external sources (e.g., federal, private), as reported in OUS audited financial statements. It includes funding for teaching/training grants, student services grants, library grants, and similar support. There was an administrative change in 2010 to match national standards for calculating sponsored research. The revised data exclude gift aid and include indirect cost recovery to more accurately reflect expenditures. In most years this resulted in a slight reduction to sponsored research. Data are reported as dollars in millions for each fiscal year.
II. KEY MEASURE ANALYSIS

<table>
<thead>
<tr>
<th>KPM #19</th>
<th>RESEARCH DOLLSR PER FACULTY - Sponsored research dollars per faculty at research/doctoral universities - OSU, PSU, UO ($ in thousands).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Quality: Increase quality and external resources for research and scholarship programs</td>
</tr>
<tr>
<td>Oregon Context</td>
<td>OBM7b – Research and development (academia)</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Controller’s Office, Annual Financial Reports; OUS Institutional Research Services</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

1. OUR STRATEGY

Attract and retain productive faculty and develop university capacity for successful pursuit of research funding.
2. ABOUT THE TARGETS

Ideal performance for this measure is increasing research expenditures per faculty member. Any cuts affecting research faculty, programs, or facilities will have a negative impact on this measure. Targets for 2014 and 2015 reflect the projected decreasing trend in sponsored research expenditures due to sequestration of federal research dollars.

3. HOW WE ARE DOING

The number of faculty and research dollars available both affect this metric, and both shifted during the past year, creating a $27,000 drop in research dollar expenditure per faculty at public research and doctoral universities in Oregon. While the numerator (research dollar expenditure) decreased by almost $25 million in total (see KPM 18) and $24 million specifically at PSU, OSU, and UO; the number of full time ranked instructional faculty (denominator) increased at these institutions in the past year by 281 people, over 100 of which were due to changes in IPEDS reporting definitions. While the increase in faculty positively affected the student faculty ratio (KPM 11), this, combined with the decrease in federal money used for research, caused a sharp decline in this metric.

4. HOW WE COMPARE

According to the National Science Foundation’s Survey of Higher Education Research and Development, FY2010, Oregon faculty are very successful at attracting research funding. On a per faculty basis, Oregon ranks 17th among the 50 states in Research and Development expenditures from federal sources and 33rd among the 50 states in R&D from state. (rankings include OHSU).

5. FACTORS AFFECTING RESULTS

Sponsored research is a measure of faculty quality and productivity, as well as faculty and institutional entrepreneurship. An institution’s research enterprise reflects its competitive capacity to attract and retain respected and productive faculty with mature research programs. This measure shifts along with changes in external funding-federal, state and private- for sponsored research and by growth (or decline) in the number of faculty.

6. WHAT NEEDS TO BE DONE

The campuses have invested these funds strategically, and despite a decline in state support, the faculties collectively have produced significant research growth. These grant dollars support salaries for research staff and students at Oregon institutions and provide
significant direct and indirect economic activity.

7. ABOUT THE DATA

Data represent expenditures for sponsored research and other activities at OSU, PSU, and UO using grant funds from external sources (e.g., federal, private), as reported in OUS audited financial statements. It includes funding for teaching/training grants, student services grants, library grants, and similar support. Data are reported as dollars in thousands for each fiscal year. Faculty data represent a headcount of full-time instructional faculty at OSU, PSU, and UO. Additional information on OUS faculty is available in the OUS Fact Book at www.ous.edu.
## KPM #20

**Philanthropy - Total gifts from philanthropic sources ($ in millions). A) Total, B) Capital Projects, C) Faculty Support (including chairs), D) Scholarships, E) Other.**

<table>
<thead>
<tr>
<th>KPM #20</th>
<th>1997</th>
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<tbody>
<tr>
<td>1. OUR STRATEGY</td>
<td></td>
</tr>
<tr>
<td>Establish funding priorities with university-affiliated foundations and promote strong relationships with alumni, businesses, and community supporters.</td>
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</tbody>
</table>

### Goal
- Quality: Increase quality of existing programs – customers’ views

### Oregon Context
- Academic excellence; OBM26 – College completion

### Data Source
- OUS Controller’s Office; Annual Financial Reports

### Owner
- OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704

### Graph
- **Philanthropic Gifts ($ in millions)**
  - Bar is actual, line is target
  - Data is represented by currency

### Table

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</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>71.50</td>
<td>78.00</td>
<td>88.00</td>
<td>114.30</td>
<td>120.00</td>
<td>150.80</td>
<td>209.70</td>
<td>143.40</td>
<td>128.00</td>
<td>150.40</td>
<td>143.40</td>
<td>150.40</td>
</tr>
</tbody>
</table>

Data is represented by currency
II. KEY MEASURE ANALYSIS

2. ABOUT THE TARGETS

Ideal performance is a steady increase in gifts from philanthropic sources.

3. HOW WE ARE DOING

Philanthropic giving increased by 17.5% in FY 2013 compared to FY 2012. The increase over 2012 gifts was due to the number and size of gifts for capital construction and capital assets. These gifts for construction projects include, but are not limited to, OSU’s student success center, the Reser Stadium renovation project and sports performance center; UO’s Papé Fields and WOU’s Devolder Center. 2013 continues historic levels of philanthropic giving as campus fundraising becomes increasingly vital to campus funding.

a) Total gifts in FY 2013 ($150.4 million), compared with FY 2012 ($128.0 million), are in the following categories:

b) Capital projects: $27.1 million compared to $18.9 in FY 2012
c) Faculty support: $30.6 million compared to $29.1 million in FY 2012
d) Scholarships: $26.8 million compared to $25.3 million in FY 2012
e) Other (includes research, service, and management support): $66.0 million compared to $54.6 million in FY 2012

4. HOW WE COMPARE

While there are no national norms to suggest what performance on this measure should be, university foundations across the nation are playing a larger role in university funding by contributing to student, faculty, and facility enhancements at a time with state appropriations are declining.

5. FACTORS AFFECTING RESULTS

Targeted fundraising campaigns at individual institutions can affect the system total in any given year. Institutions engaging in capital fundraising campaigns will often experience spikes in annual giving. The overlap of these types of capital project campaigns can account for variations between fiscal years.

6. WHAT NEEDS TO BE DONE

University foundations should continue to work with campus leaders to establish fundraising goals and priorities. Foundation funds enhance university operations rather than covering basic operating costs. Many private donations are restricted to specific aspects of the
university (e.g. scholarships, facilities, research) and are often placed in long-term endowments. Strong communication between university administrators and their affiliated foundation is paramount.

7. ABOUT THE DATA

Data are collected annually for the previous fiscal year (July 1 through June 30) and reported in the OUS audited financial statements. In order to comply with a legislative directive to report breakouts for this measure, the definition was modified in 2007. Because of changes to GASB reporting requirements, consistent data for this measure and its component parts are not available prior to 2004. Complete audited financial statements are available on the OUS website at www.ous.edu.
1. OUR STRATEGY

Continue to invest in and leverage SWPS programs by aggressively seeking outside grants and contracts that add value to current programs.
2. ABOUT THE TARGETS

Ideal performance on this measure is an increasing ratio of external funds generated per state dollar. The performance indicator is likely to decline again in FY 2014.

3. HOW WE ARE DOING

The significant growth in 2011 and 2012 is the result of increases in federal investment in competitive research and simultaneous decreases in state support. FY 2012 state appropriations were lower due to budget cuts associated with changes in the Oregon economic forecast. External funds were higher due to increases in funding from sponsored research.

Existing faculty hired before the recession were successful at procuring long-term grants that are still bearing fruit even at a time when state dollars are shrinking. This trend is not sustainable. Current and anticipated reductions in SWPS appropriation will reduce the FTE available to generate external funds. The performance indicator is likely to begin falling again in FY 2014.

4. HOW WE COMPARE

There are no national standards or benchmark comparisons available.

5. FACTORS AFFECTING RESULTS

State support is essential to the ability of SWPS programs to hire faculty who conduct research and engage in research-based outreach work. Anticipated reductions in the SWPS appropriation will reduce the FTE available for research and external awards are projected to decline beginning in FY14. Additionally, there will be fewer federal research dollars available to research faculty as due to sequestration of these funds.

6. WHAT NEEDS TO BE DONE

Continue to invest state funds in areas that promote positive results for external funding, such as bio-based energy production; preservation of water, watersheds, and water quality; and ecological services. Support initiatives related to foods and wood products, agriculture and
forest productivity, viticulture and enology, and coastal and forest-based tourism. Receive more gifts, grants, and other revenues that are generated by research-based outreach work delivered through Extension education. Additional external funding strengthens local capacity to improve the economy, the environment, and social systems.

State funding helps provide for the continued placement of faculty and support staff statewide to ensure all Oregonians have access to community based and solution-oriented knowledge. Through continued adoption of innovative distance education technologies, Extension education will reach a greater portion of the state population. Increasing the number and capacity of trained citizen volunteers and seeking expansion of grants and contracts further extends the impact of these programs.

7. ABOUT THE DATA

Performance ratios are derived from state resource expenditures and expenditures from all other sources for all OSU Statewide Public Services, including the Extension Service, the Agricultural Experiment Station, and the Forest Research Laboratory. The OSU Office of Budget and Fiscal Planning Data coordinates the annual collection and analysis of College of Agricultural Sciences, the OSU Extension Service, and the College of Forestry data before collectively reporting KPM data to OUS.
OREGON UNIVERSITY SYSTEM

II. KEY MEASURE ANALYSIS

### KPM #22

CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Quality: increase quality of existing programs – customer’s views</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Context</td>
<td>OBM26 – College completion</td>
</tr>
<tr>
<td>Data Source</td>
<td>OUS Strategic Programs and Planning, customer surveys</td>
</tr>
<tr>
<td>Owner</td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
</tr>
</tbody>
</table>

#### Percent Rating Service Good or Excellent

```
2006        2007        2008
Accuracy    84%        85%        83%        85%
Availability of Information 84%        83%        85%        83%
Expertise   90%        89%        90%        87%
Helpfulness 89%        87%        86%        87%
Overall     87%        87%        87%        87%
Single Part  87%        87%        86%        86%
Timeliness  87%        87%        86%        87%
```

1. OUR STRATEGY

Ensure high quality and responsiveness in meeting the needs of students and other constituents throughout all OUS activities.

2. ABOUT THE TARGETS
Oregon University System

II. Key Measure Analysis

Ideal performance on this measure is a high level of student satisfaction.

3. HOW WE ARE DOING

In 2008, almost 87% of OUS students expressed satisfaction with the overall quality of service provided by their institution. Respondents were most satisfied with the knowledge and expertise of OUS faculty and staff, with 90.4% providing a rating of “excellent” or “average.” Students also expressed satisfaction with the helpfulness of OUS faculty and staff and timeliness of services, rated 86.4% and 86.1% respectively. These results are based on a response rate of approximately 16% but the findings are consistent with those obtained through a long-standing survey of OUS graduates reported in KPM 10. In this survey, 87.6% of graduates from the class of 2007 rated the overall quality of their educational experience as a 4 or 5 on a 5-point scale in which 1 is “poor” and 5 is “excellent.” No data are available 2010 or later due to the suspension of the source survey as a result of budget and staff reductions in the Chancellor’s Office.

4. HOW WE COMPARE

There are no national standards on which to compare OUS performance on this measure with other public universities or systems. Every Oregon state agency is required to implement a standard customer satisfaction survey of a constituent population, but survey populations and implementation methodologies vary widely, undermining any meaningful comparison.

5. FACTORS AFFECTING RESULTS

OUS institutions strive to provide excellent service to all students and meet the needs of their unique student populations. All institutions seek to use the expertise and knowledge of faculty and staff to provide services and information that is accurate, timely, and helpful.

6. WHAT NEEDS TO BE DONE

As Oregon’s public universities seek to increase access and continue to work on alignment across education sectors, monitoring student and graduate satisfaction remains a priority. In times of diminished resources, important academic and non-academic student support services are reduced as administrative functions are cut to preserve instruction and course availability. The challenge is quickly identifying where students are experiencing dissatisfaction and employing available resources to make adjustments. On an ongoing basis, each university and individual departments monitor student satisfaction through course evaluations and alumni surveys.
7. ABOUT THE DATA

Improvements to the survey methodology in 2008, including an expansion of the survey population, do not allow for direct comparisons to 2006 results. Beginning in 2008, the satisfaction survey was implemented online. Invitations to participate in the survey were sent via email to all juniors and seniors – over 36,000 students – enrolled at all seven OUS institutions in late May. Students had approximately two weeks to respond to the survey. The response rate was just under 16%. Individual results were weighted by the likelihood of being selected (a weight derived by the population of juniors and seniors at the specific institutions and the number of responses from that institution). Results are compiled and reported in aggregate.

Staff and budget reductions within the Chancellor’s Office forced the suspension of survey activity conducted by the Chancellor’s Office. As a result, data for 2010 forward are not available. Complete reports of earlier surveys of recent graduates, including satisfaction data, are available on the OUS website at www.ous.edu.
## OREGON UNIVERSITY SYSTEM

### II. KEY MEASURE ANALYSIS

<table>
<thead>
<tr>
<th>KPM #23</th>
<th>Boards and Commissions Best Practices: Percent of total best practices met by the Board.</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td>Effective governance and oversight</td>
<td></td>
</tr>
<tr>
<td><strong>Oregon Context</strong></td>
<td>The 2006 Joint Legislative Audit Committee (JLAC) instructed DAS and LFO to develop best management practices performance measures with respect to governance oversight for applicable boards and commissions.</td>
<td></td>
</tr>
<tr>
<td><strong>Data Source</strong></td>
<td>Board Best Practices Assessment and Discussion</td>
<td></td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td>OUS Performance Measurement and Surveys, Anji Duchi (541) 346-5704</td>
<td></td>
</tr>
</tbody>
</table>

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### 1. OUR STRATEGY

Provide appropriate Board oversight and management practices to fulfill the mission and goals of OUS.
2. ABOUT THE TARGETS

Ideal performance is full adherence to sound management practices. Targets reflect the continuing board goal to be in full compliance with best practices.

3. HOW WE ARE DOING

Through a two-phase process, culminating in a facilitated discussion on October 8, 2010, members of the State Board of Higher Education reached agreement that current practices conform to best practice standards on 15 of 15, or 100%, of identified criteria.

4. HOW WE COMPARE

There are no national norms for this measure. State agencies meeting established criteria have been required to conduct this assessment.

5. FACTORS AFFECTING RESULTS

Recent activities through the Board of Higher Education’s Governance and Policy Committee have provided a venue for discussing management practices and opportunities for improvement. The Governance and Policy Committee first proposed changes for institutional governance vis-à-vis Legislative Concept 759 introduced in August 2012. In the most recent legislative session, Senate Bill 270 was passed, enabling the larger OUS institutions to be granted their own governing Boards.

6. WHAT NEEDS TO BE DONE

Since the end of the legislative session, the Chancellor’s Office is working internally, with the Board leadership, with the campuses, and with the Governor’s Office to begin to fill in the details of the transition to institutional boards for OSU, PSU and UO. This includes surveying all of the campuses on their preferences and plans for shared services; beginning to discuss which areas/programs will transition to the HECC or other entities, and planning to provide staff and other support to the legislative working groups on small campuses and on shared services, as well as continuing the role and function of the Chancellor’s office. OUS is also supporting the Board in discussions about the regional/technical universities and governance options in the future. The OUS Board will conduct a planning retreat in September 2013 in order to review the transition pathway in the context of the OUS mission, the 40-40-20 goal, and the programs and functions OUS and the Chancellor’s Office provides to the campuses and to the state overall. Board
responsibilities, management practices, and Board make-up will change during 2014.

7. ABOUT THE DATA

OUS staff researched the established best practices criteria used in 2010, outlining an assessment form and methodology and collecting information on relevant current practices. Members of the Board were given the assessment form in September 2010, and asked to indicate which of the best practices criteria were being met by current practices. Individual results and comments were compiled, and the Board engaged in a facilitated discussion at the October 2010 Board meeting.
III. USING PERFORMANCE DATA

Agency Mission: 351.009 Mission of education beyond high school. The Legislative Assembly declares that the mission of all education beyond high school in Oregon includes achievement of the following by 2025: (1) Ensure that at least 40 percent of adult Oregonians have earned a bachelor's degree or higher; (2) Ensure that at least 40 percent of adult Oregonians have earned an associate's degree or post-secondary credential as their highest level of educational attainment; and (3) Ensure that the remaining 20 percent or less of all adult Oregonians have earned a high school diploma, an extended or modified high school diploma or the equivalent of a high school diploma as their highest level of educational attainment.

[1993 c.240 &5; 2011 c.638 &3]

Contact: Anji Duchi, OUS Performance Measurement & Surveys
Alternate: Bob Kieran

Contact Phone: 541-346-5704
Alternate Phone: 541-346-5758

The following questions indicate how performance measures and data are used for management and accountability purposes.

1. INCLUSIVITY

* Staff: Performance measurement and accountability have been an evolving process within OUS. Historically, the development of a performance measurement program for OUS first began in 1997 with the identification of broad societal goals for public higher education. Performance measurement was codified in statute with the passage of SB 919 by the 1997 Legislative Assembly. These goals included access, quality, employability, and efficiency. Recent changes made to the performance measurement process and indicators, through passage of Senate Bill 242 in the 2011 Legislative Assembly and the resulting 'Achievement Compacts' are discussed further in the next section of this document under 'Managing for Results'.

* Elected Officials: The 23 agency performance measures reported here reflect a majority of the indicators initially identified in November 1997. In addition to this APPR, OUS is also currently responsible for Achievement Compacts for each of its seven institutions to the Oregon Education Investment Board (OEIB) which reflect progress on bachelor’s and advanced degrees awarded to Oregonians; bachelor’s degrees to rural Oregonians, bachelor’s degrees to transfer students from Oregon’s community colleges, graduates employed in the workforce, employer and alumni satisfaction, and the number of Oregon freshmen entering with high school dual credit or other early entry credit. All of these measures are also reported for underrepresented minority Oregonians as well as for students who were Pell recipients.

* Stakeholders: One key component of Senate Bill 242, passed into law in the 2011 Legislative Assembly, includes students being more broadly involved on university-based committees that develop
tuition rate proposals sent to the Board of Higher Education for approval each year. Additionally, Achievement Compacts are approved by campus Provosts, the OUS Board Academic Strategies Subcommittee as well as the full OUS Board. An Achievement Compact advisory committee will be implemented for 2013-14 and subsequent fiscal years.

* Citizens: In 2000, OUS invited business leaders to review the performance measurement process and suggest improvements. Their feedback was valuable in clarifying public expectations for accountability reporting. This ad hoc advisory group recommended that OUS focus on a limited number of indicators most critical to success and set higher performance targets. In response to their feedback, the Board elevated 12 key performance indicators (KPIs) out of the 30 proposed in the first year. This change streamlined data collection and analysis, and focused campus efforts on improving processes and results in critical areas of educational quality and student success.

2 MANAGING FOR RESULTS

The Oregon University System (OUS) closely tracks performance at our seven universities in order to monitor improvement and examine trends that may affect higher education in the state. These results are communicated to the Board, the Legislature, campuses and the public through a variety of publications. Performance measurement is critical for providing reliable information on the performance of Oregon's public higher education sector. Monitoring performance enables institutions to benchmark their own performance against performance targets and allows for informed policy discussion and development.

As part of the annual Performance Review Process, the Oregon State Board of Higher Education reviews with each president the institution's targets for the OUS key performance indicators. In 1997, the Oregon University System adopted a performance measurement policy to align with system goals as defined by the Oregon State Board of Higher Education and to meet the mandates laid out in Senate Bill 919. Refinements in 2001, developed in consultation with campus leaders, created the array of measures currently in use, comprising twelve indicators (with a thirteenth—student-faculty ratio—added later). Institutions were asked to establish performance targets for five of those measures: (1) freshman retention within the university, (2) total degrees awarded, (3) degrees in shortage areas, (4) graduate satisfaction, and (5) sponsored research expenditures. Each OUS university also identified two measures reflective of its institution mission and priorities for which targets would also be established. Since that time, the Board has received regular reports on system and campus progress with respect to these measures.

Under the leadership of Governor Kitzhaber and the Oregon Education Investment Board (OEIB), the
OUS in aggregate, each OUS institution and other education sectors have developed Achievement Compacts that include measurements set to inform and guide the system’s work. The first Achievement Compacts were approved by the State Board of Higher Education, and approved by the OEIB in April 2012. As the work of the OEIB on Achievement Compacts progresses, the Compact requirements are likely to change in 2013-15. These Compacts currently measure progress on bachelor’s and advanced degrees awarded to Oregonians; bachelor’s degrees to rural Oregonians, bachelor’s degrees to transfer students from Oregon's community colleges, graduates employed in the workforce, employer and alumni satisfaction, and the number of Oregon freshmen entering with high school dual credit or other early entry credit. All of these measures are also reported for underrepresented minority Oregonians as well as for students who were Pell recipients.

The OUS Institutions will also use performance metrics to establish a similar compact with the Board of Higher Education, thus enabling the Board to manage OUS and its institutions as a portfolio of institutions. These metrics were developed in support of each campus' mission and will contain dimensions of student access and participation; academic program; and research and innovation including the intensity of these dimensions within each institution's unique mission. The state Board of Higher Education is also currently exploring ways to align campus mission metrics with the new Achievement Compacts. Performance measures will remain a requisite component of all policy option packages evaluated by the Board, and Board working groups and committees are exploring performance measurement as a means of communicating priorities and results. They are also a component of the formal evaluation of university presidents.

3 STAFF TRAINING

The Office of Performance Measurement and Surveys employs one full time employee. In general, OUS Performance Measurement and Institutional Research staff benefit from membership in local and regional associations like the Pacific Northwest Association for Institutional Research and Planning (PNAIRP) and the Oregon Public Performance Measurement Association (OPPMA). These associations and the professional development opportunities afforded to members, help to broaden performance discussions to include national and international trends and provide a forum for discussing best practices in performance measurement.

4 COMMUNICATING RESULTS

* Staff : The State Board of Higher Education and the Oregon Legislature have received formal annual performance reports based on the OUS KPMs discussed in this report and the prior 13 Board-level KPIs elevated in 2000. The 2011 performance compact with the state and requisite compact with the campuses are still under development with the Board Academic Strategies Committee and the OUS Provost's Council. Reports will be posted on the OUS website (www.ous.edu) and available in hardcopy format upon completion.
Performance results related to specific initiatives (e.g., research, degrees, participation, etc.) are also communicated through agency press releases and various system reports such as the OUS Fact Book. The purposes of these publications are to (1) describe progress towards achieving agency goals, (2) identify risk factors to making improvements, (3) set budget and policy priorities, (4) provide information to stakeholders and the public, and (5) increase accountability to Oregon taxpayers.

* Elected Officials: In compliance with current state directives, OUS reports performance results to both the executive and legislative branches of state government.

* Stakeholders: OUS has focused on improving communication through greater transparency. The web-based component provides information in a format and language that would be understandable to all readers. Trend data and improvement targets are posted at http://www.ous.edu/dept/ir/performance

* Citizens: As a testament to the success of OUS in the area of gathering information, degree production, economic impact, adult education and extension service, and alignment with preK-12 education, Oregon was given a “best practice” rating—the highest grade awarded—for a well-developed higher education accountability system. Education Sector, a think tank promoting education reform, analyzed accountability systems across the nation and identified varied results in its 2009 scorecard. Researchers measured states in 21 categories of accountability, including affordability, degree production, and research, taking into account not only the collection of information, but effective use and reporting of the data.

The report identified Oregon’s strengths as “gathering information on a wide breadth of performance measures, collecting and reporting data in a timely fashion, comparing data across time and/or against peers, aligning state priorities with concrete goals for achievement, and formally linking budgetary decisions to the performance of state postsecondary institutions.” Opportunities for improvement included “proactively informing prospective students, parents, and the general public about the performance of state colleges and universities.”