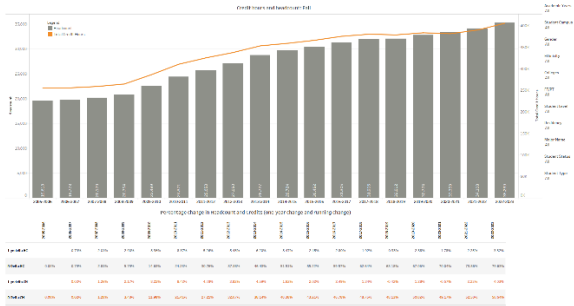


Enrollment Management and Financial Aid Briefing

Overview of Enrollment Trends

The overall enrollment picture at Oregon State University continues to be strong, even against a backdrop of softer enrollment patterns nationwide. The final census number of enrolled students for Fall, 2022 stood at a record 35,239, which represents an increase of 3.3% over Fall, 2021, and an 80% increase since 2005. Credit hour enrollment is also at a record high 405,530, up 4% from the prior year, and up 59% from 2005.

Our enrollment success stands in contrast to more modest gains at four-year public institutions nationwide. Between 2011 and 2021 (the most recent year available in the federal database)



enrollment at these institutions increased just 3.3%, compared to OSU's increase of 34%.

Looking back even farther, headcount enrollment at OSU has increased every single fall since 1996.

All charts are reproduced in full-size in the appendix for easier reading and reference.

One of the reasons for our enrollment trajectory is the strongly diversified portfolio of enrollment. As Oregon's Land Grant University, most of our academic programs have strong professional focus that makes OSU a good investment; classes at Corvallis, Cascades, and Ecampus allow us to deliver programs in different locations and modalities that allow student flexibility and our presence in every county in the state assures that the OSU brand is well known across all of Oregon.

While our overall numbers are strong, different parts of our enrollment portfolio are changing at different rates, as might be expected. Some examples of changes over the past five and ten years:

Enrollment group	2012	2017	2022	5-year change	10-year change
Cascades	828	1,263	1,366	8.2%	65.0%
Ecampus	2,839	5,782	10,191	76.3%	259.0%
Corvallis	23,368	24,762	23,598	-4.7%	1.0%
Corvallis UG	19,619	20,784	19,940	-4.1%	1.6%
Corvallis UG Residents	14,779	14,620	13,484	-7.8%	-8.8%
Corvallis UG Nonresidents	4,840	6,164	6,456	4.7%	33.4%
Corvallis Graduate	3,749	3,978	3,658	-8.0%	-2.4%
Corvallis Master's	1,565	1,536	1,426	-7.2%	-8.9%

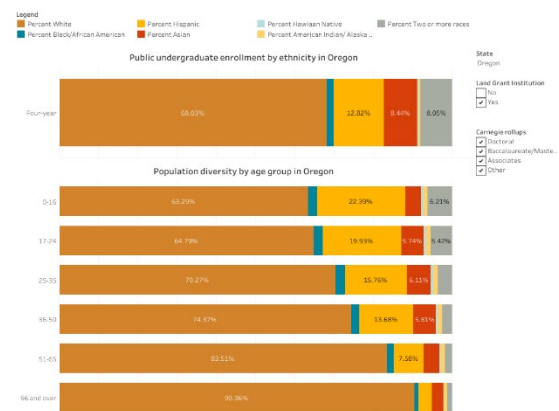
There are, of course, many factors that contribute to enrollment changes over time. Some of the change is marketing and recruitment efforts, some of it is new program development and tapping into excess or pent-up demand, and some of it has to do with external factors far larger than we can influence. Much of our overall increase, as indicated above, is driven by meteoric growth in Ecampus enrollments as online learning becomes more popular and as we add additional programs to those already offered.

Additionally, changing demographics, the national and regional economies, government orientation toward funding higher education, political divides, and the perception of value among students (and for undergraduates, their parents) all factor into the equation. Thus, it is dangerous to point to any single factor, or any combination of factors, when looking at changes in enrollment patterns.

Diversity

The combined efforts of people across the university, whether faculty or staff or currently enrolled students, and whether they have operational responsibilities for diversity efforts or not, has contributed to Oregon State’s student population becoming more diverse in race and ethnicity over time. In Fall, 2022, the enrollment of US students of color stood at 10,156, and is growing at twice the rate of the overall population at OSU. Using a base of 31,824 (students of US origin for whom we know their race and ethnicity), OSU enrollment of students of color is now 32% of the total. In Fall, 2017, that percentage was 28.5% and in 2012, 22.8%.

Compared to enrollment at public four-year institutions in many other states, undergraduate enrollment at OSU more closely mirrors the diversity of the state in which we are located but still shows gaps in enrollment of students of color. **Chart 2 in the Appendix** shows OSU undergraduate enrollment at top and the ethnic makeup of the population of Oregon, by age bands, below. As you can see, the 25-35 age band most closely mirrors our undergraduate enrollment and the overall gap in Hispanic student enrollment is most noticeable. (To accurately compare OSU populations to US Census Bureau Data, students with unknown ethnicity and international students have been removed from this analysis.)

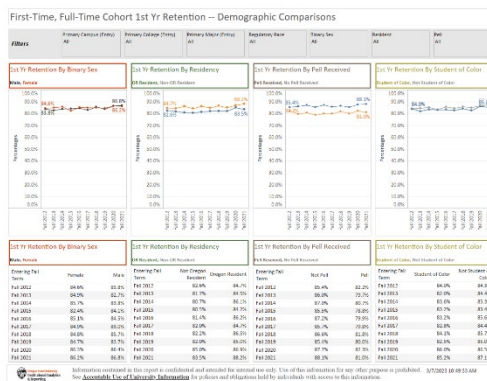


Finally, Oregon State’s overall enrollment gains in recent years are remarkable in light of national and local trends showing a drop-off in international enrollment since COVID-19. Total international enrollment peaked at OSU in Fall, 2019 at 3,510 and now stands at 2,555, a decrease of 955 students, or 27%.

Had international enrollment at OSU stayed steady since 2019, enrollment would currently be at 36,194, which would be 955 students (2.7% higher) than the Fall, 2022 figure.

Retention and Graduation Rate Performance

Student retention. First-to-second year retention rates continue to improve at OSU, rising from 84.2% for the entering class of 2012 to 86.5% for the entering class of 2021. **(Chart 3)** While these numbers have been steadily improving overall, there are some challenges OSU needs to address going forward. For instance, those same retention rates for students who are first-generation, Pell



recipients, and under-represented students of color are five points lower (81.5%).

These trends are not surprising, given the financial and social challenges these students may face, but the gap in graduation rates is more telling and concerning.

Overall six-year graduation rates have improved substantially from 67% for the entering class of 2011 to 69.9% in for the 2016 class. **(Chart 4)** Over that same period, however, graduation rates for first-generation under-represented students of color who received a Pell grant have *fallen*, from 59.9% to 56.9%. These factors combine to create a substantial challenge for any university, but even when taken individually, some gaps are apparent.

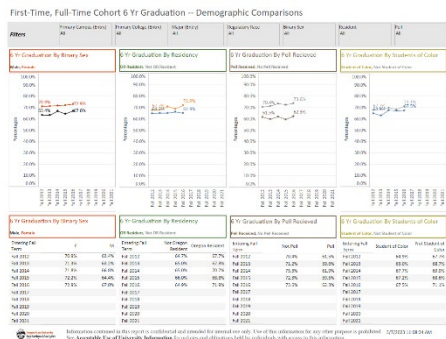
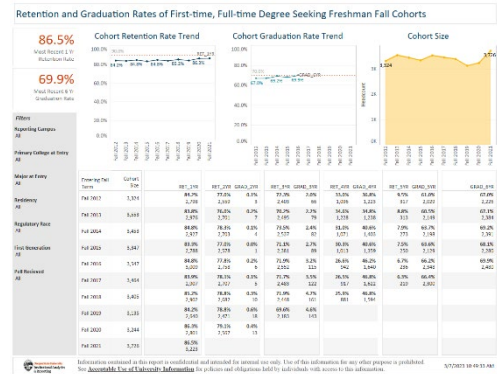
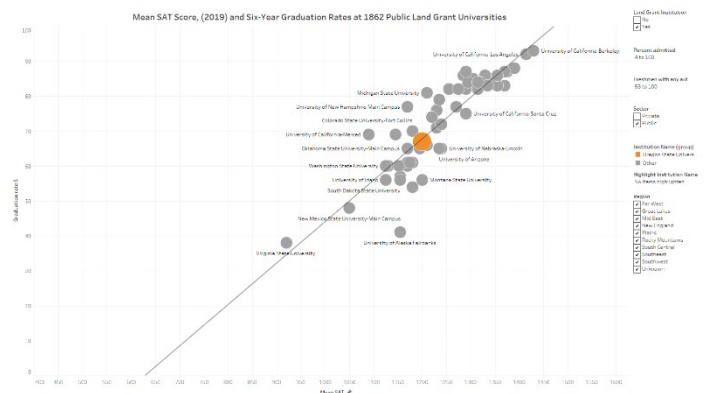


Chart 5 shows that graduation gaps persist for men, for nonresident students, for Pell recipients, and for students of color. Much of retention and graduation is a result of pre-college characteristics. For instance, a single factor that encompasses parental wealth, ethnicity, parental attainment and academic preparation results can predict graduation rates with high accuracy. When coupled with state funding and institutional financial aid, these factors are powerfully tied to outcomes. Still, among institutions with similar entering student profiles, there are divergent results and OSU is at or very near the average performance of institutions in almost any peer group we select.

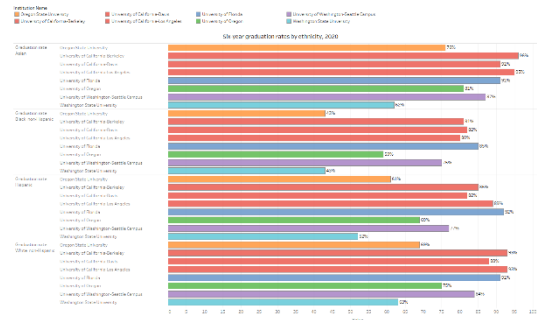
(Chart 6) Improving performance relative to these peers is a logical and reasonable first step in moving OSU forward on our student success initiatives.

After a year-long process to identify tools to assist us in improving the student experience at OSU, we have selected and are in the early stages of implementing a single campus-wide CRM (Customer Relationship Management) tool to replace the dozens of independent instances at the university, with the intent to better measure and track student engagement, coordinate communications and interactions, identify and solve students challenges, and help us research the things that allow students to persist and graduate.



While operations and processes won't result in immediate results, this important first step in a longer-term student success strategy is likely to contribute to better retention and graduation results when combined with other initiatives that include better admissions decisions and more strategic allocation of financial aid for low-income residents.

Still, graduation rates (**Chart 7**) are highest at public institutions where state funding is good and where admissions selectivity is high; both factors make it harder for OSU to close the gap absent a dramatic shift in university enrollment priorities, state funding and strategy.



How Enrollment is Managed at OSU

At OSU, the Division of Enrollment Management (EM) is a centralized function that oversees admissions, financial aid, and scholarships for the Corvallis and Cascades campuses, and all the colleges that enroll undergraduates there, as well EM recruitment technology and web strategy, and precollege programs (including a federally funded program, GEAR-UP). Ecampus, which straddles both graduate and undergraduate programs, manages its own recruitment and marketing functions, but still processes undergraduate admissions through the EM office, in line with OSU academic policies and standards, while directing graduate admission to the graduate school and/or the appropriate college.

Enrollment Management also oversees international admissions, with support from the INTO OSU joint venture in the areas of marketing and recruitment. Graduate admissions are overseen by the Graduate School, with the heavy involvement of the 11 colleges. The colleges also contribute to the university's undergraduate admissions goals as partners with EM through a less centralized organizational structure that includes marketing, college- or program-specific recruitment, and awarding of scholarships funded by Oregon State University Foundation funds.

Across the wide variety of American colleges and universities, there are many different organizational structures for the Enrollment Management function. Even at OSU, our understanding of the optimal structure continues to evolve; for instance, the Registrar's Office was recently moved from EM to Academic Affairs to best align with most of the working relationships in that office (more likely to be faculty committees, academic policies, course registrations and space assignments, for instance, rather than with admissions or financial aid.) At other institutions, EM might report to the president, vice president for student affairs, or even the CFO.

Enrollment Management portfolios can include the areas mentioned above as well as student retention, new student orientation, or student access or support programs. While such vertical expansion throughout undergrad programs are common, some extensions reach horizontally, into areas like graduate recruitment, new student advising, course articulation, or even student billing.

Often the structure of the function is based on some combination of historical precedent and university mission, mixed with an important need for a response to current areas requiring

attention. Ultimately, the university's strategic vision about its enrollment mix should be the driver of its organization and the way in which it allocates resources to meet its goals and enrollment objectives.

A nimble university like OSU is always looking for better and more strategic alignment of functions, and we are currently exploring ways to better manage OSUF funds awarded as scholarships, hoping to maximize our annual spend of those funds; we are also discussing broader use of the Slate CRM that has contributed so greatly to our traditional undergraduate enrollment success by expanding it into Ecampus and/or some graduate programs; and we are adding to our capacity to develop our own social media tools and assets to better reach new markets and expand our influence beyond state boundaries.

Enrollment Benchmarks: New Student Enrollment

For the third consecutive year, *total new student enrollment* (all campuses, all levels) to the university has set records. For Fall, 2020, the number of new students was 8,242; for Fall, 2021, the number was 8,475; and for Fall, 2022, the number stood at 9,113.

- First-year student enrollment also set a second consecutive record, at 4,838, with 4,412 at Corvallis, 203 at OSU-Cascades, and 220 at Ecampus.
- At Corvallis and OSU-Cascades, resident first-year student enrollment of 2,838 is still below the record set in Fall, 2013 (2,948), but nonresident enrollment of 1,777 is 25% higher than in 2021 (1,421), and 64% higher than the prior high of 1,083 in 2017.
- In 2022, the first-year class was 61.4% residents.
- For first-year students at Corvallis and OSU-Cascades, several states have shown dramatic growth:
 - California sent 610 students in 2022, up from 488 in 2021, and up from 372 in 2019
 - Washington sent 412 students in 2022, up from 266 in 2021, and up from 161 in 2019
 - Hawaii sent 118 students in 2022, up from 105 in 2021, and up from 77 in 2019
 - Colorado sent 147 students in 2022, up from 92 in 2021, and up from an average of 21 over the previous ten years
 - Other states that set records for sending first-year students to OSU in 2022 included Texas, Illinois, Minnesota, Arizona, Utah, Idaho, Montana, and Wyoming
- Undergraduate transfer enrollment was also positive, led by the strong performance of Ecampus. The 2,309 transfer students who enrolled in Fall, 2022 were second only to Fall, 2020 totals of 2,331.
 - Of the new transfer students, 1,047 were Ecampus students (up from 878 the year before), while 1,249 (down from 1,368 in 2021) enrolled at OSU-Cascades and Corvallis. The falloff in traditional, campus-based transfer students is driven in large part by a dramatic drop in Oregon community college enrollments, which are down 33% 2011-2021 at Linn-Benton and 40% statewide over the same period.
- For the first time, the Office of Admissions stopped considering applications for admission well before the start of the term, on May 2, 2022 for Corvallis first-year admission. For Fall of 2023, we were able to enforce our published February 1 priority

deadline for first-year students to Corvallis. We have established a waiting list of approximately 1,000 students who can be admitted later if enrollment proves softer than anticipated, and we are working on offering several other options to students affected.

- New graduate student enrollment has been largely stable over time. The 1,011 new students in Fall, 2022 is on par with the most recent peak of 1,057 students in Fall, 2014, but the trend has been generally positive since 2019, when the recent low of 941 occurred.

Progress on Strategic Initiatives

Enrollment Strategy Task Force

In the spring of 2022, the provost charged a task force to look at the direction of our enrollment strategy as we prepare to retire SP 4.0 and bring forth a new strategic plan. A small group of faculty and staff from OSU and OSU-Cascades was tasked with putting our enrollment strategy into national and local context, identifying implicit and explicit tradeoffs that come with every decision, and recommending the best path forward, balancing our mission as Oregon's Land Grant University, our aspirations for continuous improvement in meeting that mission, and market realities that are beyond our control. The task force is preparing briefing papers that outline challenges and opportunities that can inform OSU's strategic planning effort.

Some examples of the questions and the tradeoffs implicit in the answers:

- How do other universities treat "inclusive excellence?" Is inclusivity a fundamental part of excellence, or a byproduct of it? What can we learn by looking at institutions like University of Virginia or Arizona State?
- What might be the best way to increase outcomes and student success? Should we admit only students with greater prospect of timely graduation? Should we dramatically increase funding for students from lower income families? Given state funding models that show Oregon ninth in the nation for funding community colleges, but 45th in funding four-year universities (see below), should we recognize the message in the funding strategy and develop better partnerships with community colleges that are better funded and better equipped to work with low-income students? What does that mean for OSU as an engine of opportunity?
- What is the proper size and trajectory of OSU's Ecampus, and what is the relationship between it and the size and trajectory of the Corvallis campus and OSU-Cascades?
- How does OSU-Cascades benefit from a clearer and more defined market position? What is that position?
- How can different types of graduate enrollment fit into the enrollment mix? What differences exist between master's, doctoral, and professional doctoral programs? Should we invest in creating more programs and opportunities? Where should these programs be offered?
- What is our optimal future enrollment of international students? How can we hedge against external factors like world health, perceptions of the US overseas, exchange rates, and increased price competition for international students?

Because the faculty lead of the task force left OSU to assume the provost's role at Louisiana State University, and because summer made scheduling full meetings difficult, the task force

reconfigured and reconvened in Fall, 2022. It is expected that the work will continue over the coming year and feed into ongoing strategic planning efforts.

Technology implementation is nearing maturity. In late 2019 we acquired Slate software, a customer relationship management (CRM) system designed by and for admissions office for recruitment purposes and began implementation shortly afterwards. In early 2020 we began using the system just as COVID caused us to close operations; but the efficiencies, ease of use, data access, and single point-of-contact web portals for applicants has provided substantial lift to our recruitment efforts. Students now manage their applications, receive notifications, check financial aid and scholarship awards, register for events, pay confirmation deposits, and communicate with the admissions officer assigned to their file through one system. We continue to work to add additional functionality and to improve levels of student service, despite the “challenge” of rapidly growing application volume.

We are currently discussing whether we expand our use of Slate for Ecampus and/or graduate programs. The professional programs (Veterinary Medicine, Pharmacy, and Physical Therapy) have all converted to the platform, and we did a small pilot with the College of Engineering and its joint Ph.D. program with the University of Oregon, and we are evaluating the efficacy of those efforts.

Finally, our position in the state allows us to use Slate to work with parents of students as early as middle school, to allow them better access to information about college preparation, financial aid opportunities, and paths to degrees, all of which are critical in improving access and attainment in the state. We are in the early stages of discussing a Slate practice that would allow us to bring many different programs from across the university with distributed management responsibilities under one tool to advance the greater good for Oregon and for OSU.

WUE is the Western Undergraduate Exchange of WICHE, the Western Interstate Commission for Higher Education. The program grants nonresidents in 16 western states a tuition rate 1.5 times that of residents, and has proved successful in attracting more nonresident undergraduates to Corvallis and Cascades. Our participation in the program has helped drive substantial growth in applications and enrollment from nonresidents; applications from nonresidents have increased by 163% since Fall, 2018. The revenue from these students has allowed us to make progress on the net cost figures for low-income Oregonians, below.

Progress on net cost for low-income Oregonians. The state of Oregon funding models present many challenges as we seek to balance our mission as a Land Grant University that can and should serve as an engine of opportunity in the state, with the need for the revenue necessary to fund academic excellence for all students.

By way of background, Oregon does an exceptionally good job of funding two-year institutions, but falls dramatically short on funding four-year institutions compared to other states. It seems logical, and data supports the assumption, that increased funding for four-year institutions is critical as we attempt to keep net tuition costs lower for residents.

2022 SHEEO / SHEF measures	OR	WA	CA	FL
Overall higher education funding rank, per FTE	37th	14th	15th	27th
Rank for funding two-year institutions	13th	17th	18th	46th
Rank for funding four-year institutions	45th	15th	22nd	9th

(Charts 8, 9 and 10, showing detailed overall state funding ranks for all states, rank for two-year institutions, and rank for four-year institutions, on an FTE basis; Oregon is in Orange, California in Red, Washington in Purple, Florida in Blue.)

It is not in published tuition and fees at four-year institutions where this state funding range shows up. California, for instance, with high funding, also shows high tuition; Oregon institutions with lower funding show published tuition figures closer to Washington. (Chart 11).

Instead, the impact of funding differences has been most pronounced in our position among public flagships, land grants, and other public universities in supporting lower income students. OSU’s Pell participation has fallen to below average for the group, from 30% of all undergraduates in 2013 to 23% in 2021; our rank among these 75 institutions over that time has fallen from 30th to 42nd in the group. (Chart 10). This is tied to our net cost (total cost of attendance for room and board and personal expenses, minus all grant aid), which has historically been among the highest for students from the lowest income groups. We have made a concerted effort to reduce net cost of attendance in recent years, and 2020 data are showing the results. (Charts 12, 13, and 14)

International enrollment continues to lag, and our partners at INTO have revised their forecasts to anticipate a “U-shaped” rebound in international enrollment, rather than the “V-shaped” return we had been hoping for. There are several factors driving the slow return to earlier levels: China—even before the pandemic—had begun signaling less willingness to allow students to study overseas, and the move to a more isolationist orientation is reflected in those numbers. In addition, international enrollment is extremely sensitive to exchange rates that in recent years have not been in our favor, perceptions about how welcome international students are in the US, and, more recently, impressions about how the US responded to the COVID-19 pandemic. The drop in students from China has had the effect of “unskewing” our international enrollment, however, as enrollment from other countries has been less affected. Moreover, the shift is causing our partner, INTO, to focus on recruitment strategies in other countries where we might expect to see results. Students from India are showing dramatic gains in our enrollment, as shown below. While Chinese students still represent the largest single group of international students, students from India are now one out of every seven international students at OSU.

Largest student enrollments by country	2018	2022	Four-year change	Percent change	Percent of total, 2018	Percent of total, 2022
Total students with known, non-US Citizenship	3502	2372	-1130	-32.3%		
China	1399	478	-921	-65.8%	39.9%	20.2%
India	223	323	100	44.8%	6.4%	13.6%
Taiwan	184	190	6	3.3%	5.3%	8.0%
Saudi Arabia	217	135	-82	-37.8%	6.2%	5.7%
South Korea	143	111	-32	-22.4%	4.1%	4.7%
Indonesia	126	65	-61	-48.4%	3.6%	2.7%

Our challenge will be to respond rapidly to changing needs among international students, with respect to costs, academic program offerings, and important career preparation components that students expect when they come to the US to study.

Better and more efficient spending of OSUF scholarship funds is a high priority. We appear to lag behind national benchmarks when it comes to spending the endowed scholarship funds to their fullest capacity, and we are working with the OSU Foundation administrators to make budgets, spending restrictions, and updates more visible to the people in the colleges who award the funds. Doing so serves several purposes: ensuring that the trust of donors is maintained and nurtured, helping and recognizing students with financial need or exceptional accomplishments, and, in many cases, generating operating revenue that drops to the university bottom line.

Improved enrollment projections and planning is a critical component of our future success. OSU is currently working with a partner (HelioCampus) to help us develop data on historical enrollment, financial aid, and retention data to find areas of concern, to identify areas in need of attention, and discover new opportunities for growth or investment. Good enrollment planning that allows us to take advantage of insight hidden in our enrollment patterns requires us to be able to analyze enrollment over time, tie that enrollment to gross revenue and financial aid, and study it all through a lens of retention, creating a view on the net present value of different student enrollments. Based on our feedback from other universities, we are optimistic about the rollout of the Helio platform at OSU.

The first data from HelioCampus are now essentially complete, and EM and UIT staff members are in the process of creating operational data models that will allow us to extract and manipulate this important data for our management and strategy purposes.

Transfer initiatives are perhaps the most critical components for us moving into the coming years. There are a few reasons why transfer admission is so vital to our enrollment success going forward:

- With first-year student capacity likely fixed for the near term, we may be encouraging more students to consider alternative pathways to an OSU degree that could include transfer options.
- Given shrinking pools of high school students, colleges are focusing more on transfer students, and this competition makes fast, accurate, and reliable student service more critical than it has ever been.
- Ecampus especially finds itself in a hyper competitive market against well-resourced institutions who have invested heavily in technology.
- The field is ripe for disruption. Because of limited resources, transfer admissions practices at OSU have long used manual processes that are cumbersome and burdensome for students.
- With a new general education curriculum that is designed to make transfer easier for students, we can get considerable ROI by investing in additional people and technology now.

EM and UIT are currently working with external partners to create a transfer experience that is intended to make the Amazon shopper happy. While we are in early stages of the discussion, we hope to move pieces of the whole process into production as time and budgets allow. We are also investing in staff members to help fill in the gaps where technology cannot, such as articulation of new courses from institutions we are not familiar with.

Challenges & Opportunities

Despite steady enrollment growth, Oregon State will need to address several issues moving forward that are challenges but also opportunities if handled well. Given the interrelatedness of many factors and variables, it is important to understand both the benefits and the costs of any strategy we pursue.

Rebalancing traditional, campus-based enrollment and Ecampus enrollment. OSU's most significant enrollment growth opportunities are online. Trends suggest the university will be relying more on online or remote instruction as a percentage of its overall portfolio. This will have implications for the mix of faculty and management of teaching loads across modalities and is being considered in ongoing work on OSU's general enrollment strategy.

Modernizing tuition/fee pricing. OSU currently has a wide variety of tuition and fees for undergraduates, graduates, and professional programs; for Corvallis, OSU-Cascades, and Ecampus students; and for resident and non-resident students. There are also various college-based surcharges. The university's differentiated pricing approach has the advantage of mapping tuition/fees to different cost structures and markets, but has the disadvantage of making it more difficult for students to determine exactly what they will pay prior to enrolling. In addition, the difference between Ecampus non-resident tuition and on-site non-resident tuition incentivizes non-resident students to shift enrollment to Ecampus courses while maintaining university-funded scholarships intended to be applied to higher-priced on-site courses. The effect of this campus shifting on net revenue is substantial.

Markets outside Oregon offer the most potential for growth, we are working to draw lessons from Ecampus pricing and our recent experiment with WUE. This will help us consider whether we should re-think OSU's non-resident tuition rate and implications for discounting.

It is possible that changes in pricing will have short-term costs but yield long-term benefits.

Adjusting to demographic and population changes. Much has been written about the upcoming "demographic cliff" when looking at projections of high school graduates in America. While the numbers themselves are not positive, they vary greatly by state and region, and the raw numbers, taken at face value, do not appear to be catastrophic in the state of Oregon.

The real challenge lies in the changing mix of students who are graduating from high school in the next 15 years. Oregon and OSU are far less diverse than, and likely less appealing to, the population of high school graduates we expect to see in the future. Addressing the diversity of the university at the faculty and staff level is an important step if we are to be seen as a welcoming place to students from backgrounds we have traditionally not served in large numbers.

While this is on one level a cultural challenge, it is also an economic challenge. The race and ethnicity of a high school graduate is predictive of their propensity to go to college, because race and ethnicity covary with other important predictors, like parental attainment and family income. Thus, while the drop in the raw numbers of high school graduates is of moderate concern, the willingness and the ability of the market to pay, taken as a whole, is perhaps of greater concern.

Important groundwork is being laid in the Office of Precollege Programs at OSU, as we seek to introduce both the idea of college, and the benefits of Oregon State, to populations that have

traditionally not been well served by higher education in the US. Our SMILE (Science and Math Investigative Learning Experiences), STEM Academy, and TAG (Talented and Gifted) programming gives students important and early exposure to the life of college and the opportunities it offers for both personal and career-focused goals. We want to be certain to reach and as many students for whom college might not be an automatic assumption, to provide awareness and to encourage them to develop their talent.

Good enrollment planning and development of strategy requires several approaches:

Headlights, rather than rearview mirrors. While looking backwards can help us see where we've been, what mistakes we might have made, where we succeeded, and which opportunities we've missed, it can cause us to be unaware of what's coming up. Some of those things we cannot control, such as the number of high school graduates, community college enrollment, the factors affecting international enrollments, shifting demographics, changing political climate, the public's perception of the value of higher education, the state's willingness to fund public universities, and changes in the economy affecting ability of markets to pay, for instance.

However, we manage and control our aspiration and our vision; we create the academic programs and the educational philosophy of our curriculum; we set our price with the understanding of market responses; we decide which external markets we want to pursue; we determine the proper mix of enrollments across campuses, levels, enrollment statuses, student and faculty diversity; we establish the optimal combination of research, service, and instruction and the connections between and among them; and we understand and articulate the unique combination of characteristics that OSU is known for and that OSU wants to be known for via our brand. Critically, we decide what we are going to stop doing. And just as important, we control the flow of admittedly constrained resources to ensure we can accomplish the things we set out to do.

Summary

Oregon State has seen remarkable growth and success in its total enrollment. Our increase of 88% in headcount since 1980 puts us 12th in the nation among 72 land grant, flagship, and other major public universities. In light of this success, it would be easy to take continued growth for granted, but we are perhaps at the onset of a perfect storm in American higher education that makes our future less certain than it has been in previous eras.

Truly strategic enrollment management at Oregon State University is still in its infancy, but we believe progress to date has been mostly positive and puts us on the path to continued success.

The challenges are clear, and the choices we must make to turn those challenges into opportunities await us. We think these are exciting times at OSU and we look forward to facing and meeting the future, confident of emerging a stronger and better institution in the future.

Appendix: Full-sized charts from paper

Chart 1: OSU total headcount and credit hours since 2005, Fall terms

Chart 2: Diversity of undergraduates at OSU compared to the state of Oregon

Chart 3: First-to-second year retention rates at OSU

Chart 4: Six-year graduation rates

Chart 5: Breakouts of six-year graduation rates

Chart 6: Graduation rates related to mean SAT in the first-year class, 2019

Chart 7: Graduation rates by ethnicity at major public universities

Chart 8: State funding per full-time equivalent student (FTE), total

Chart 9: State funding per full-time equivalent student (FTE), two-year institutions

Chart 10: State funding per full-time equivalent student (FTE), four-year institutions

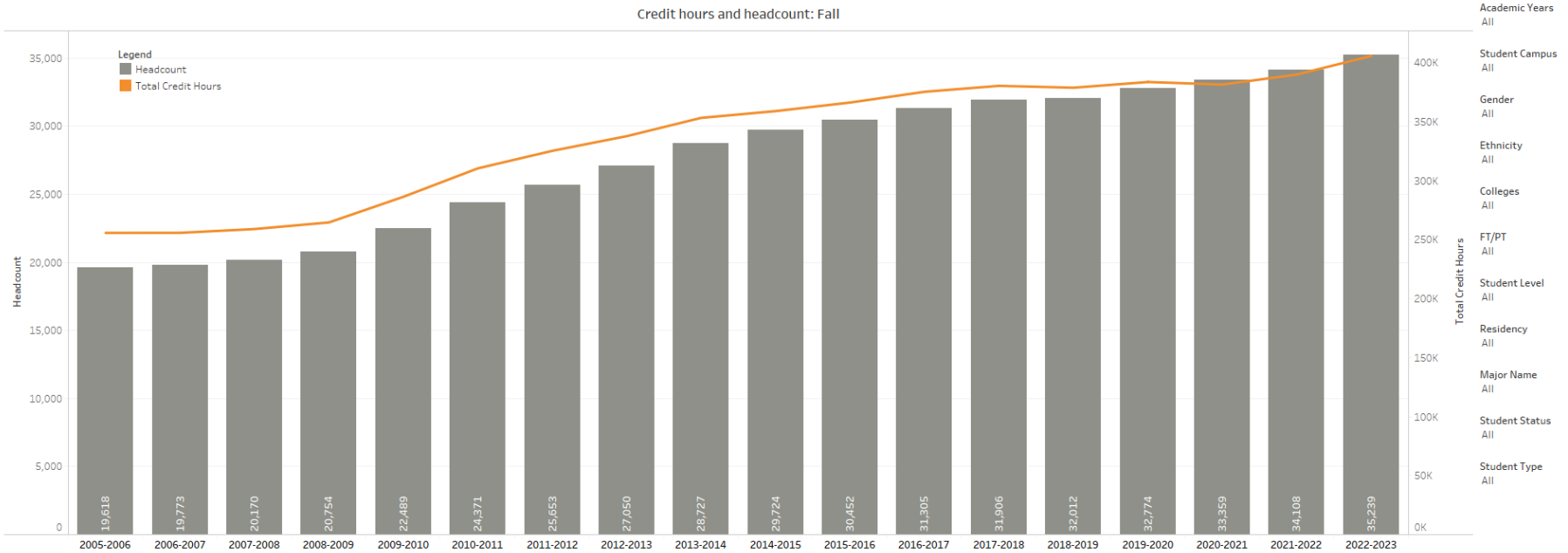
Chart 11: Resident tuition and fees at selected land grant and flagship universities 2009—2021

Chart 12: Pell participation at OSU and other land grant and flagship universities, 2013, 2017, 2021

Chart 13: Net cost of attendance for first-year students from families with incomes less than \$30k, 2013, 2017, 2021

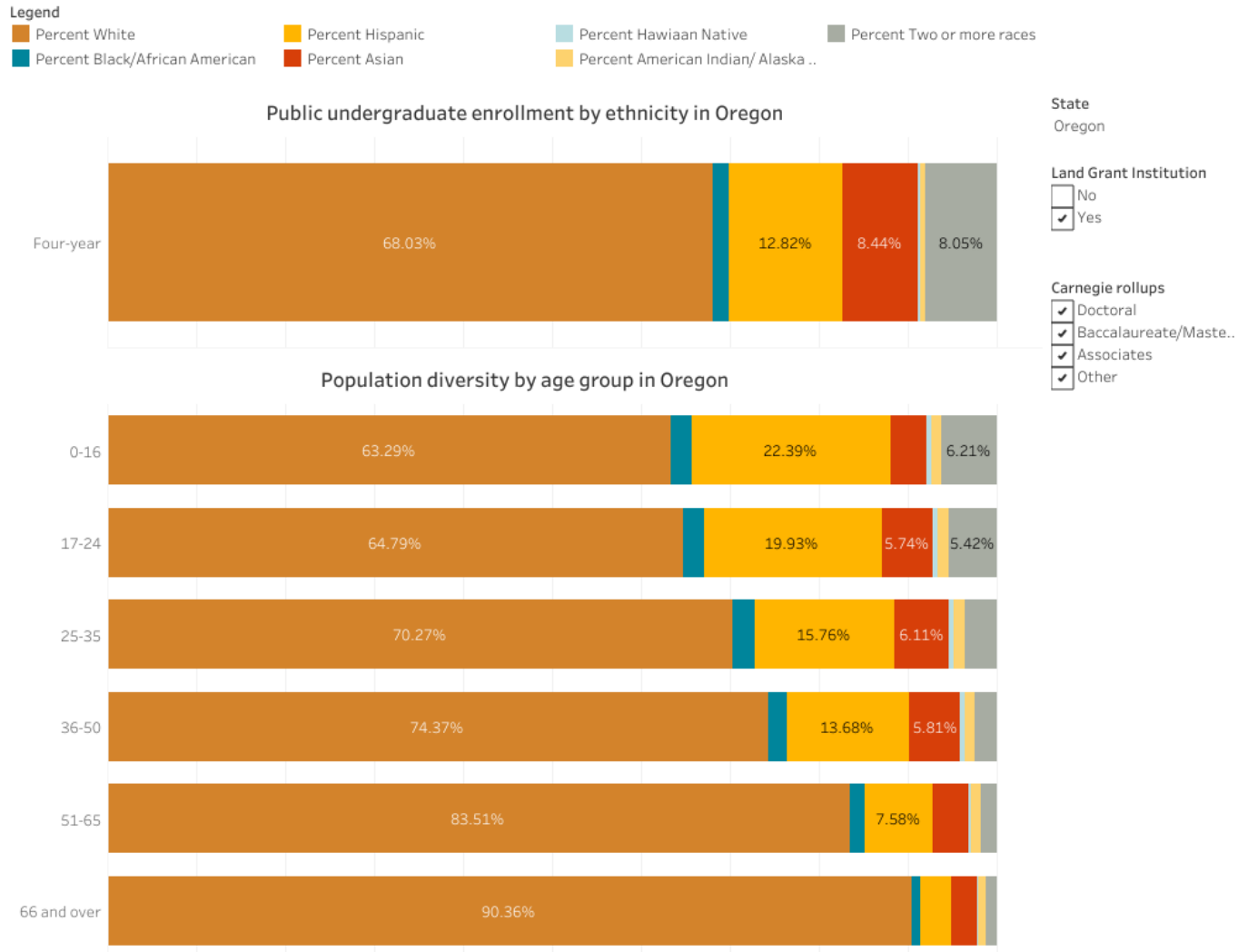
Chart 14: Net cost of attendance for first-year students from families with incomes between \$30K and \$48K, 2013, 2017, 2021

Chart 1: OSU total headcount and credit hours since 2005, Fall terms



	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
1-yr delta HC		0.79%	2.01%	2.90%	8.36%	8.37%	5.26%	5.45%	6.20%	3.47%	2.45%	2.80%	1.92%	0.33%	2.38%	1.78%	2.25%	3.32%
R-Delta HC	0.00%	0.79%	2.81%	5.79%	14.63%	24.23%	30.76%	37.88%	46.43%	51.51%	55.22%	59.57%	62.64%	63.18%	67.06%	70.04%	73.86%	79.63%
1-yr delta CH		0.02%	1.26%	2.17%	8.22%	8.42%	4.78%	3.82%	4.59%	1.62%	2.02%	2.49%	1.34%	-0.42%	1.28%	-0.57%	2.23%	4.03%
R-Delta CH	0.00%	0.02%	1.28%	3.48%	11.98%	21.41%	27.21%	32.07%	38.14%	40.38%	43.21%	46.78%	48.75%	48.13%	50.02%	49.17%	52.50%	58.64%

Chart 2: Diversity of undergraduates at OSU compared to the state of Oregon



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Chart 3: First-to-second year retention rates at OSU

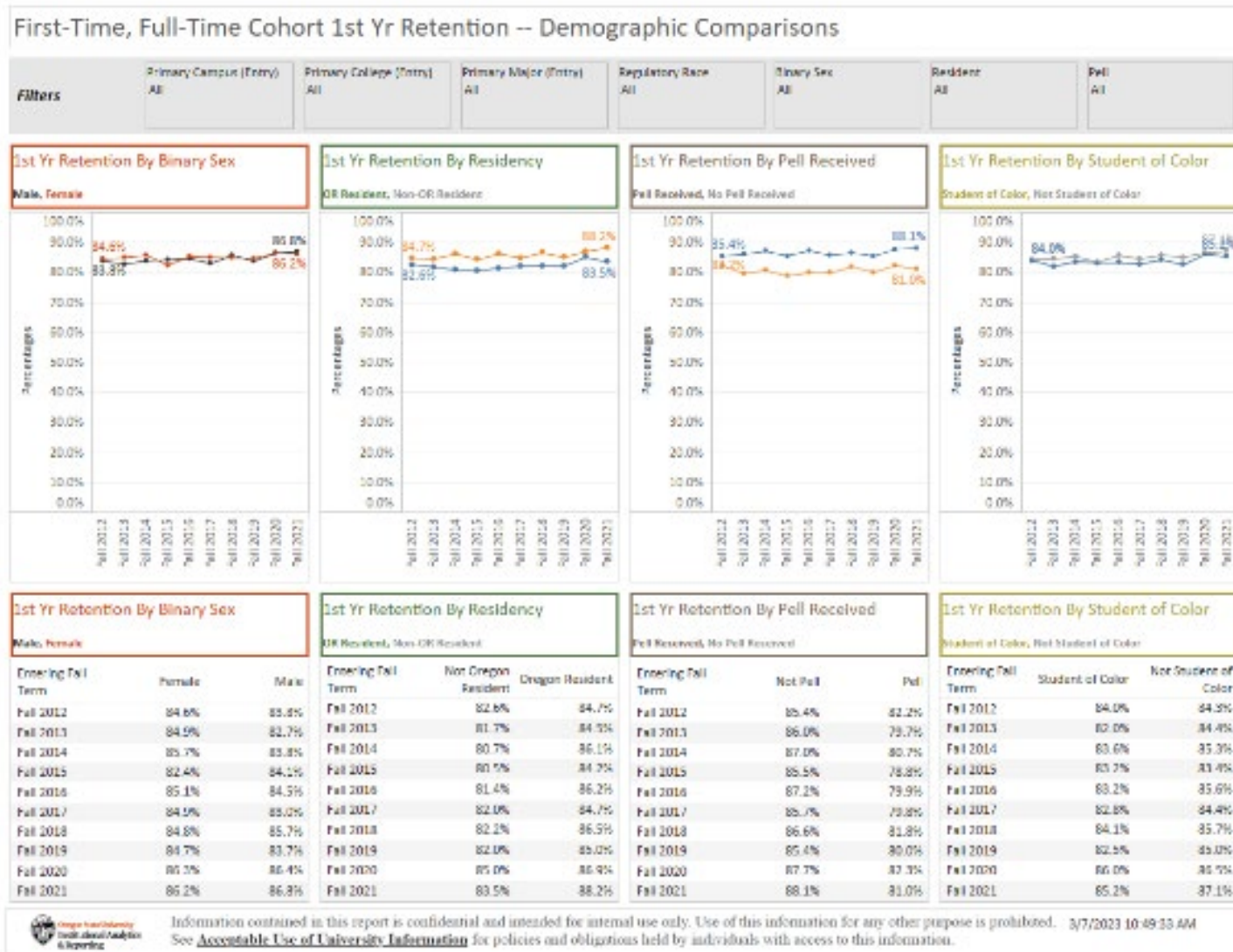


Chart 4: Six-year graduation rates

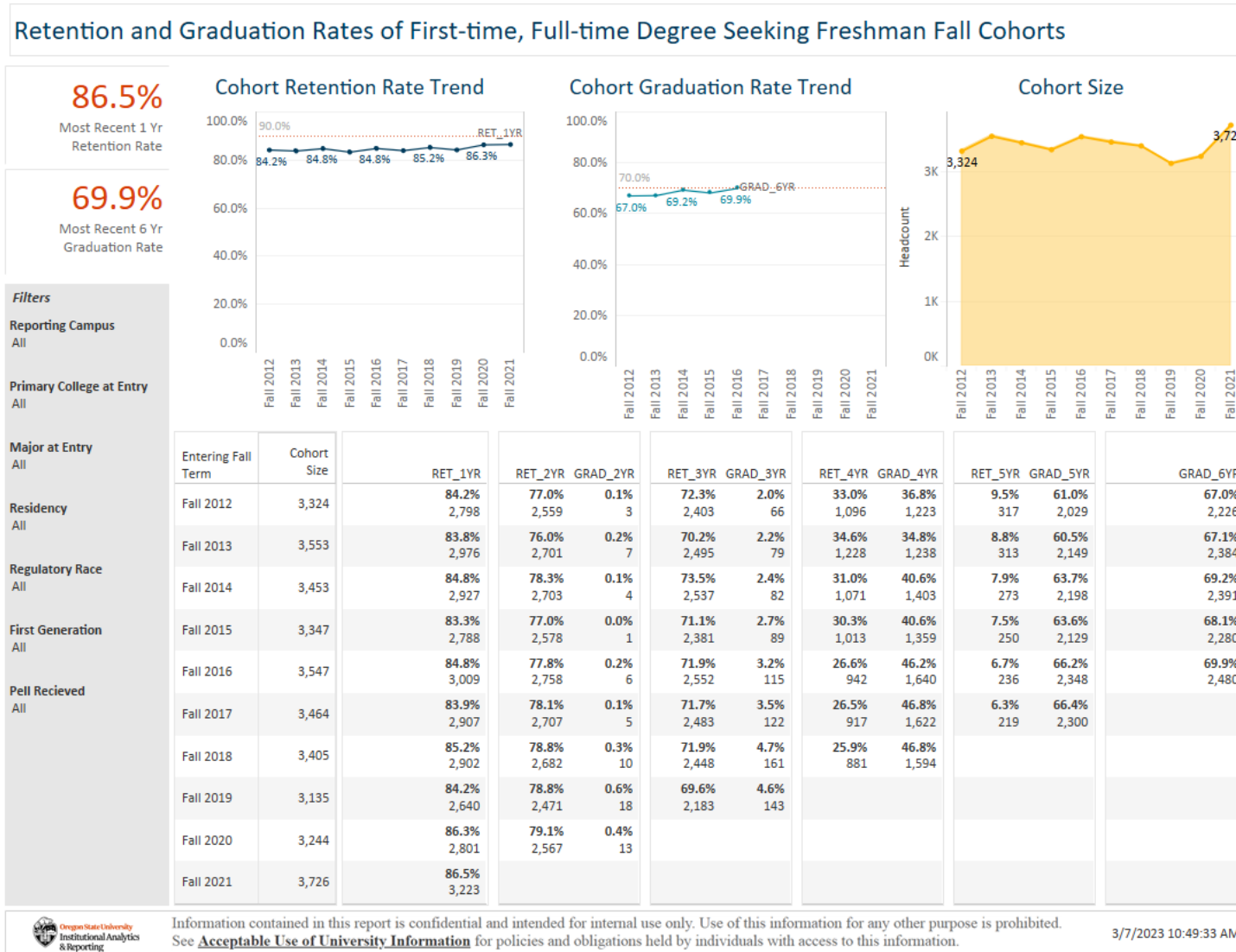


Chart 5: Breakouts of six-year graduation rates

First-Time, Full-Time Cohort 6 Yr Graduation -- Demographic Comparisons

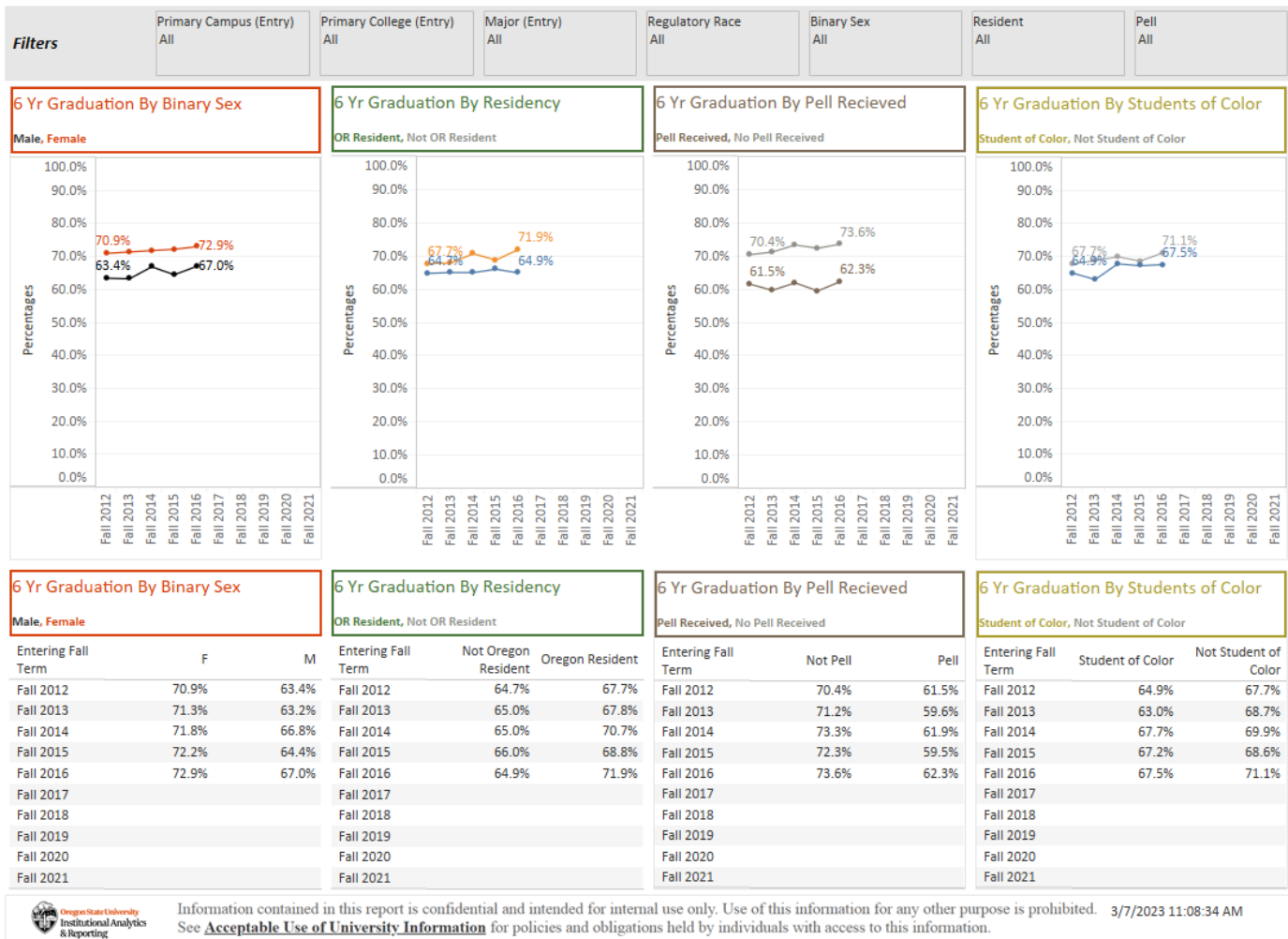


Chart 6: Graduation rates related to mean SAT in the first-year class, 2019

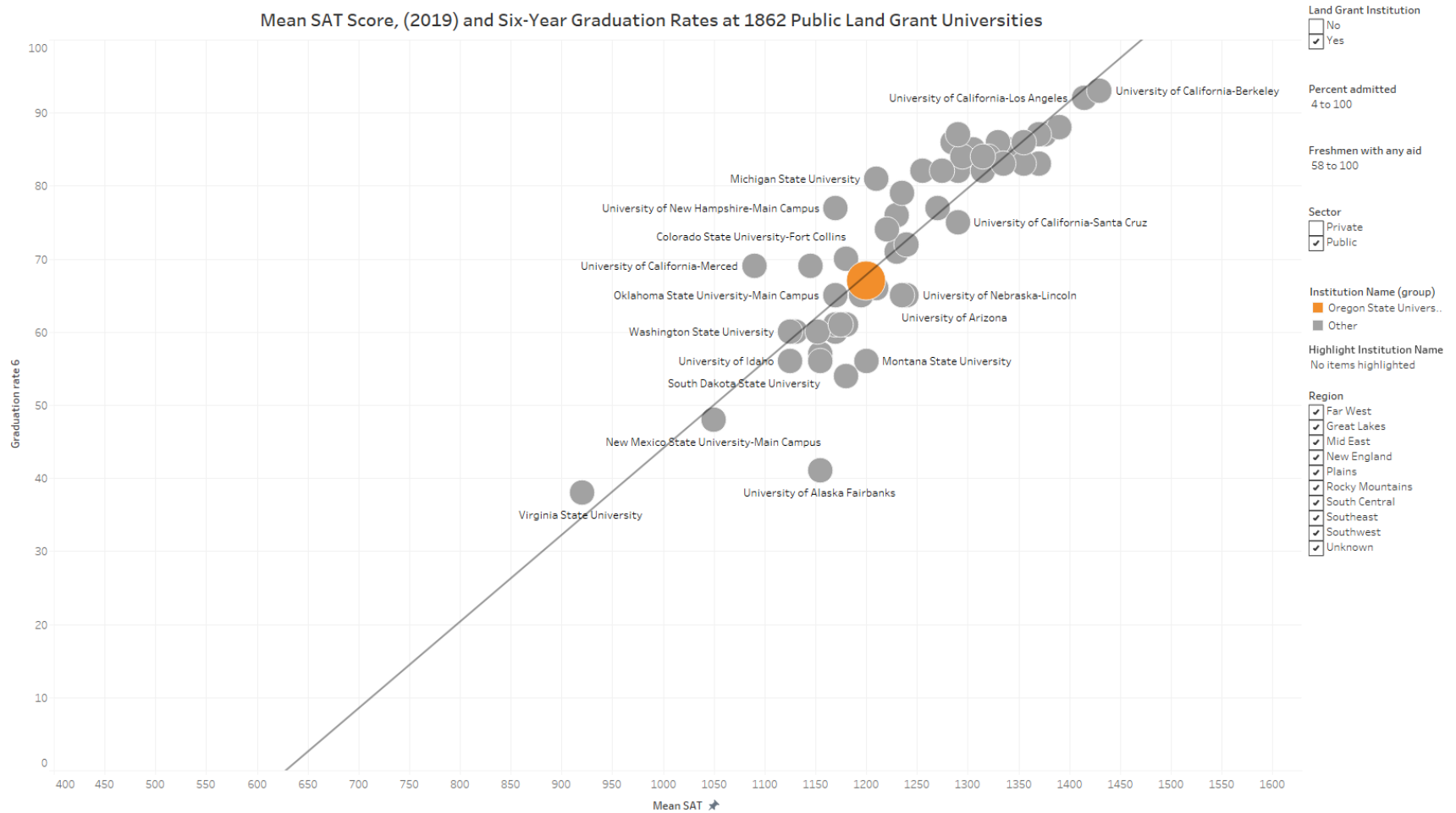


Chart 7: Graduation rates by ethnicity at major public universities

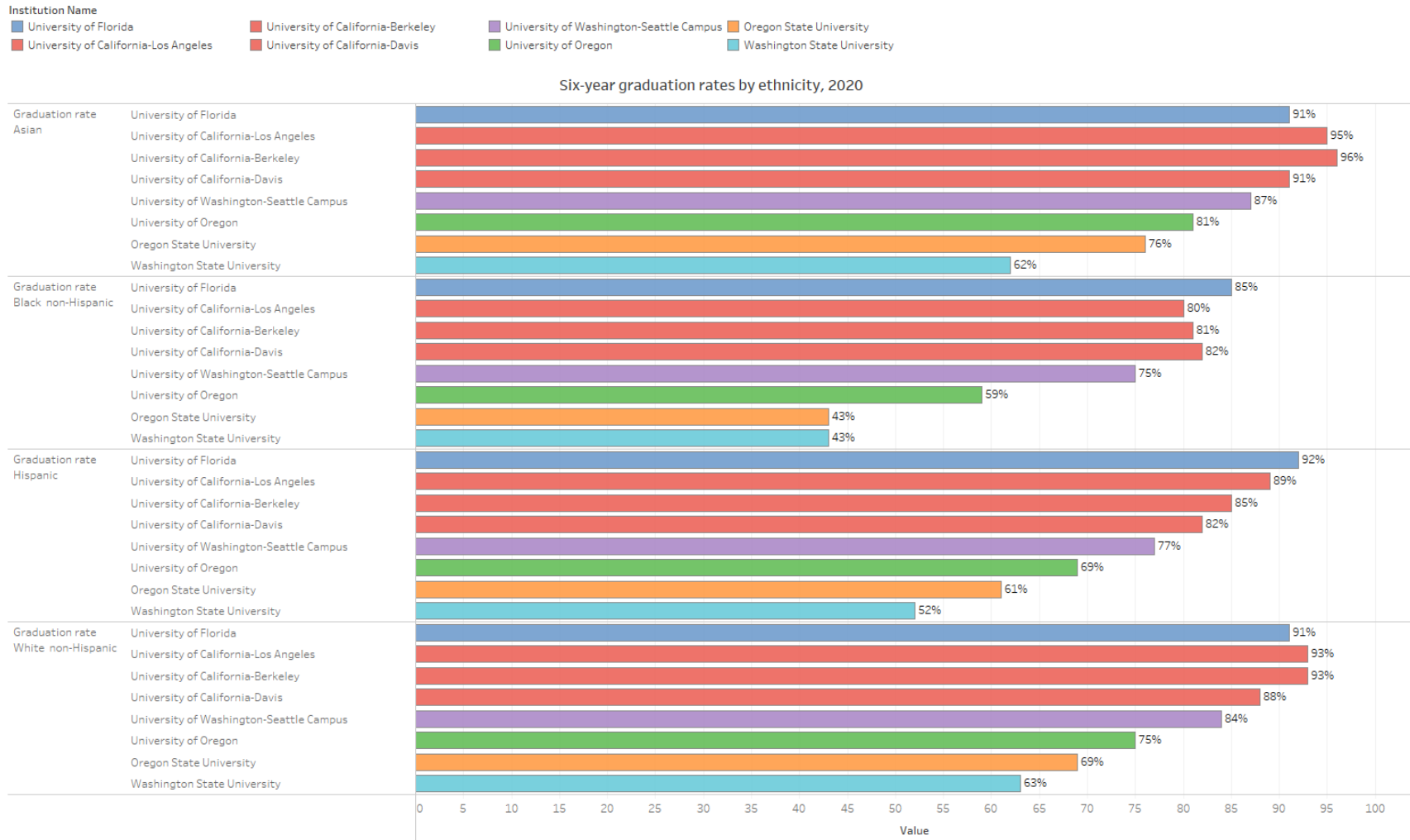


Chart 8: State funding per full-time equivalent student (FTE), total

Funding type per FTE
Total

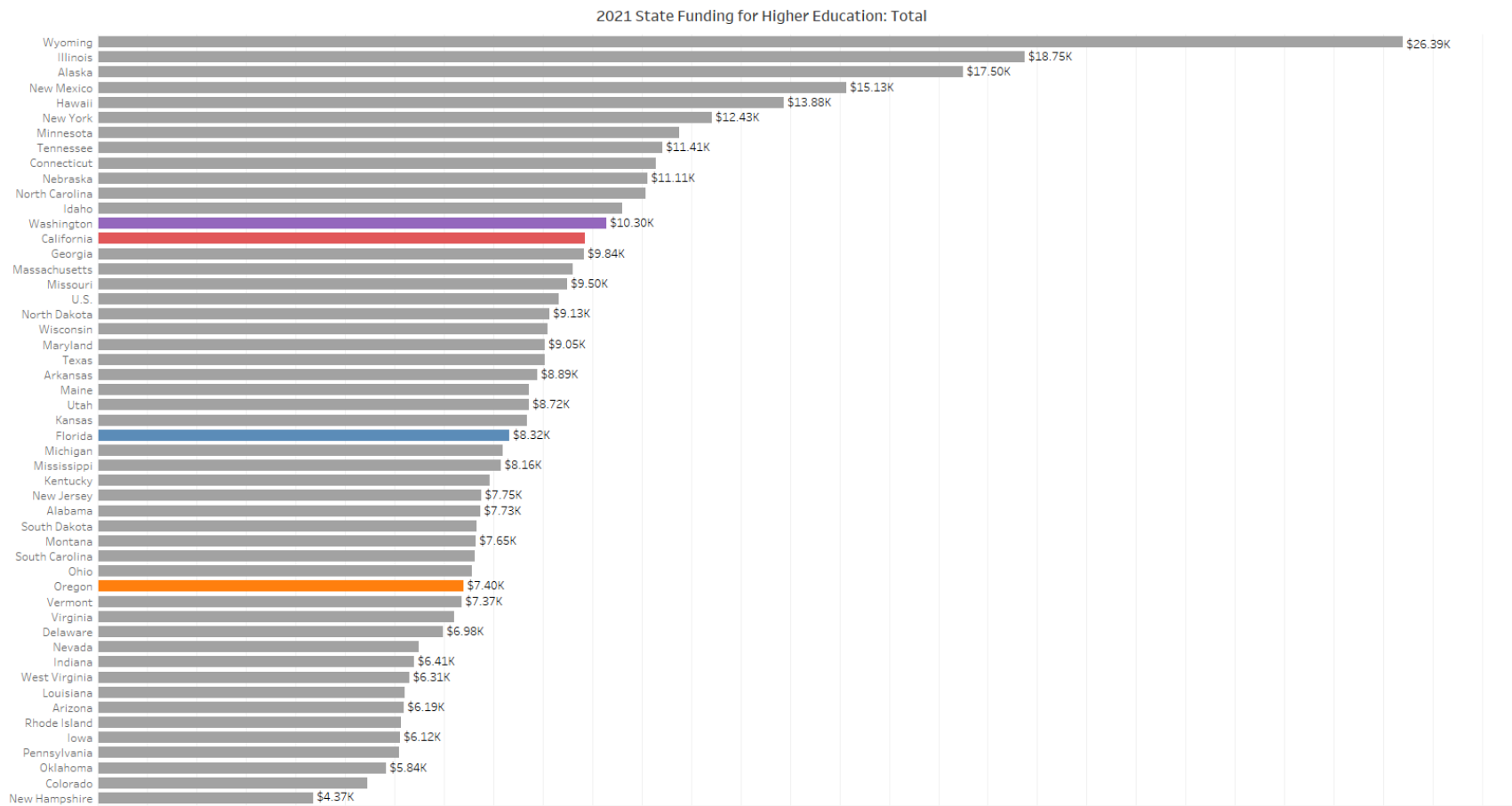


Chart 9: State funding per full-time equivalent student (FTE), two-year institutions

Funding type per FTE
Two-year

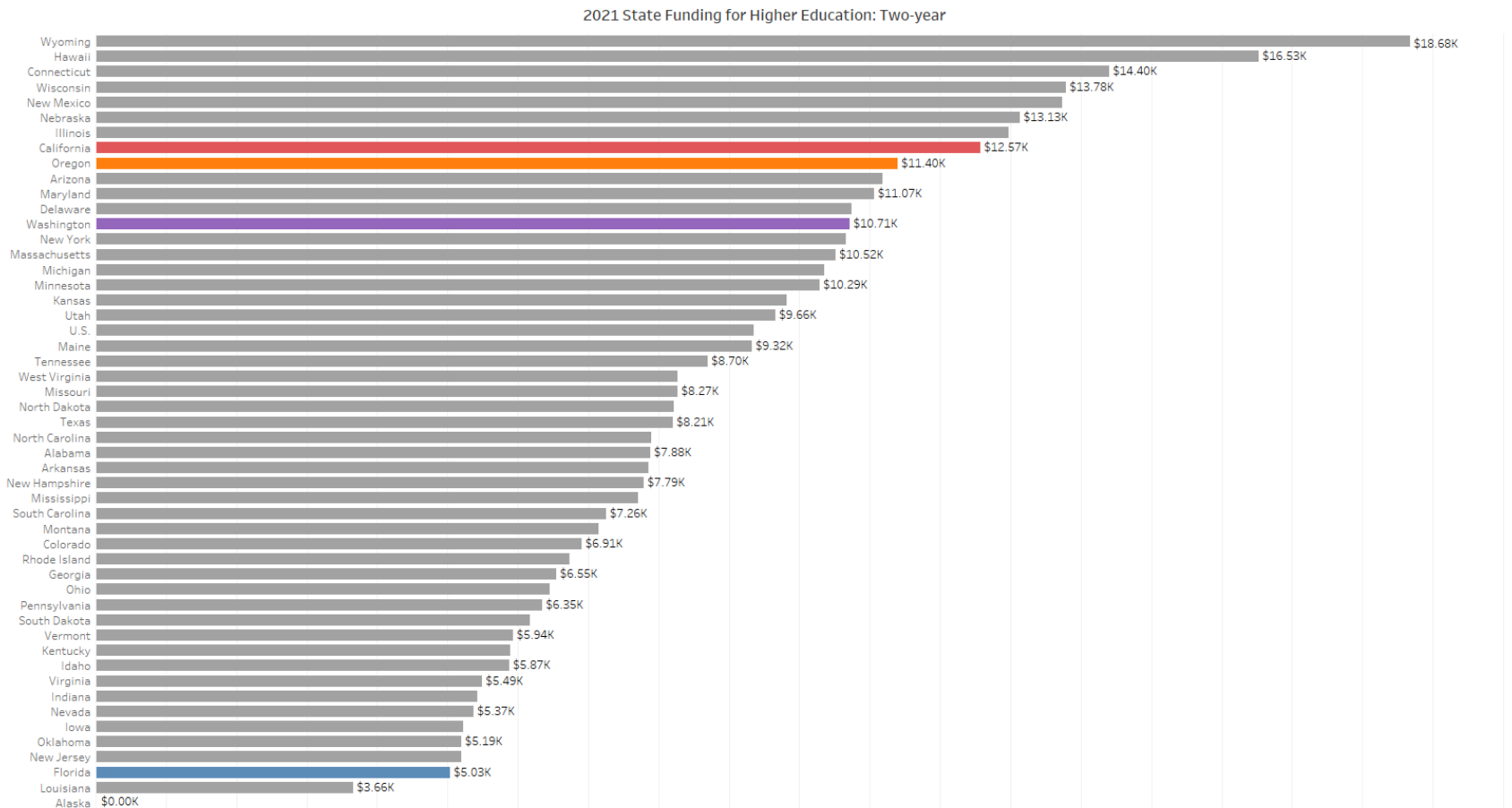


Chart 10: State funding per full-time equivalent student (FTE), four-year institutions

Funding type per FTE
Four Year

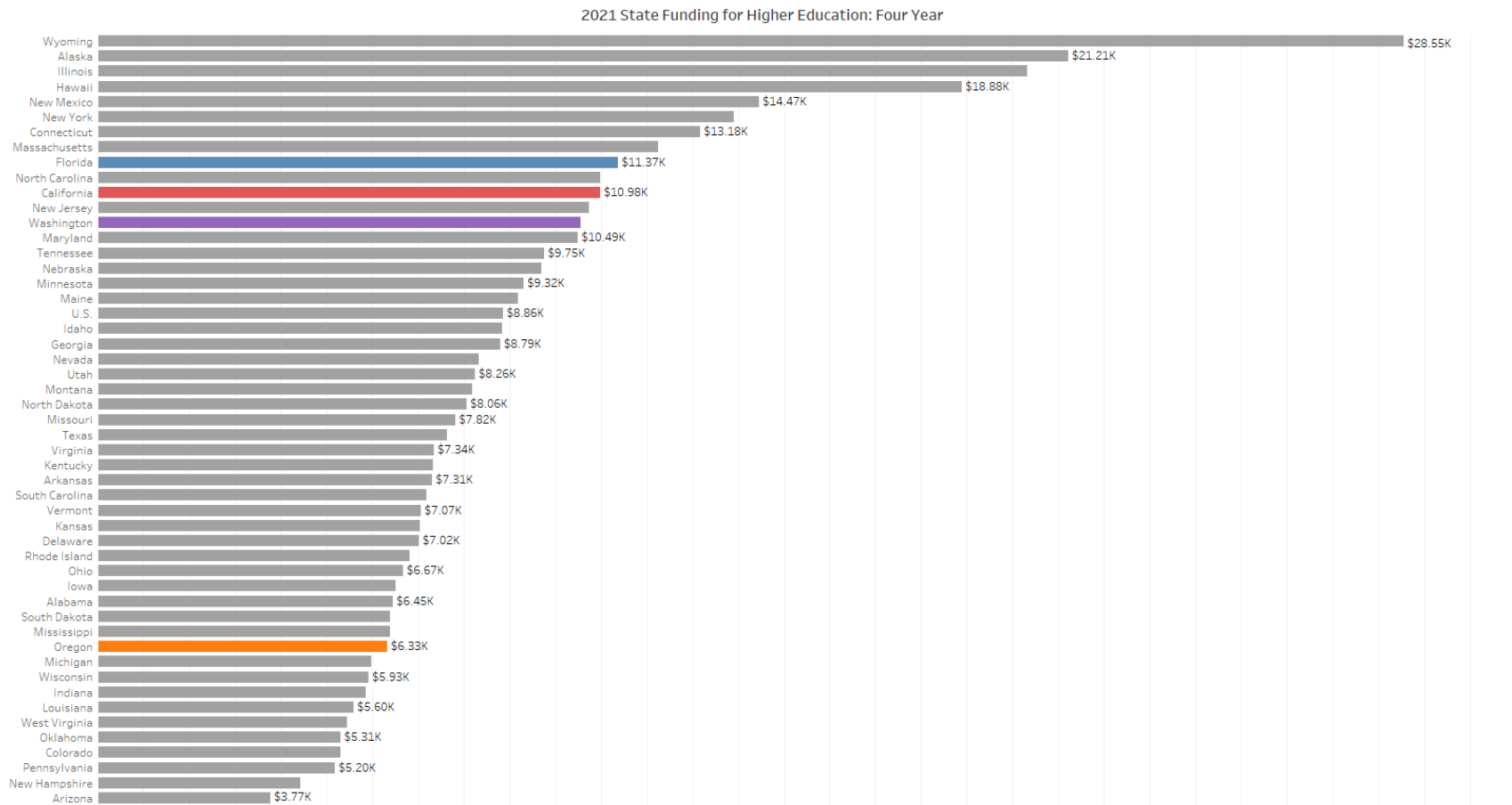
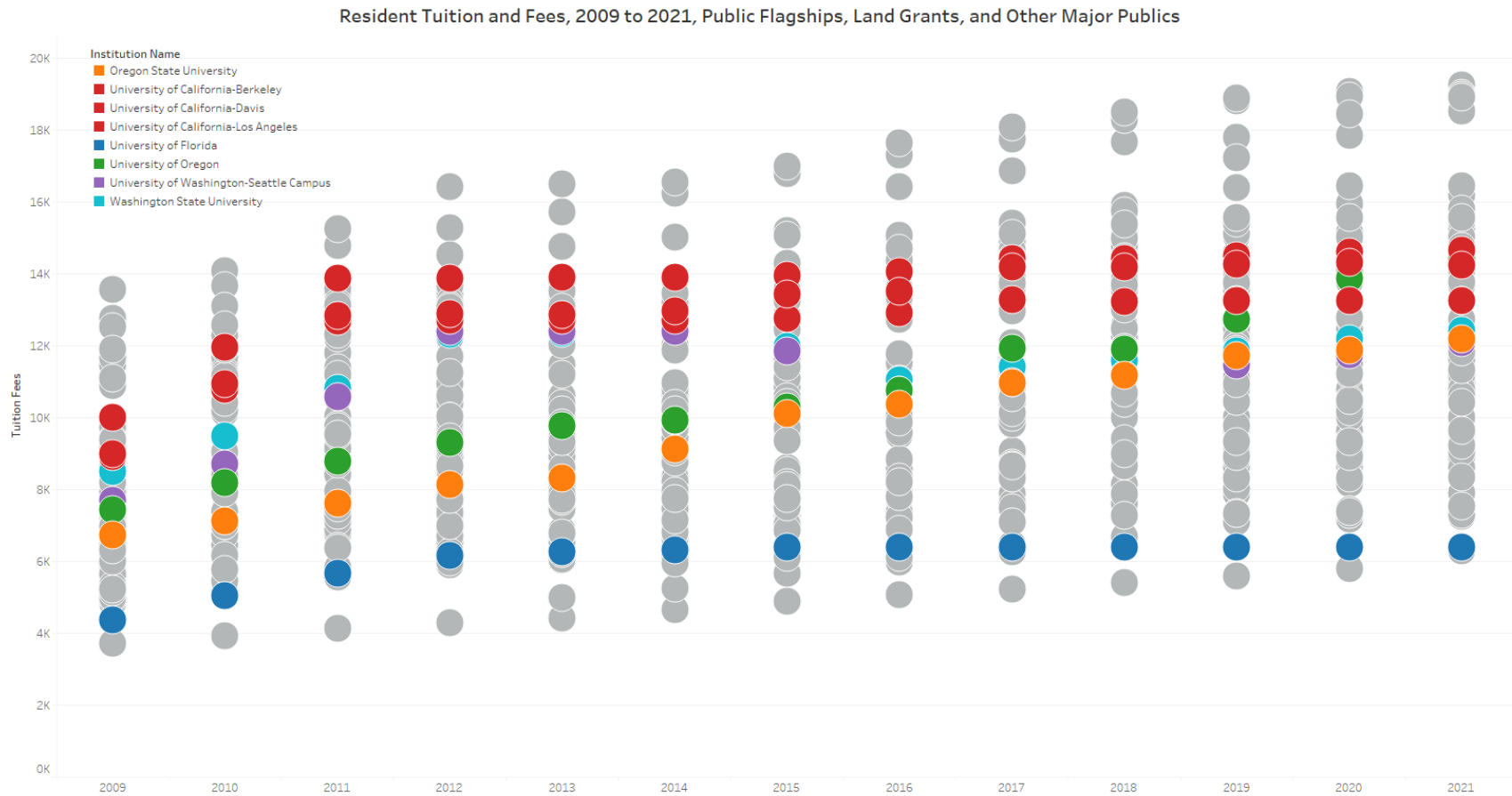


Chart 11: Resident tuition and fees at selected land grant and flagship universities 2009—2021

Highlight State
No items highlighted



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Chart 12: Pell participation at OSU and other land grant and flagship universities, 2013, 2017, 2021



Chart 13: Net cost of attendance for first-year students from families with incomes less than \$30k, 2013, 2017, 2021



Chart 14: Net cost of attendance for first-year students from families with incomes between \$30K and \$48K, 2013, 2017, 2021

