

Enrollment Management and Financial Aid Briefing

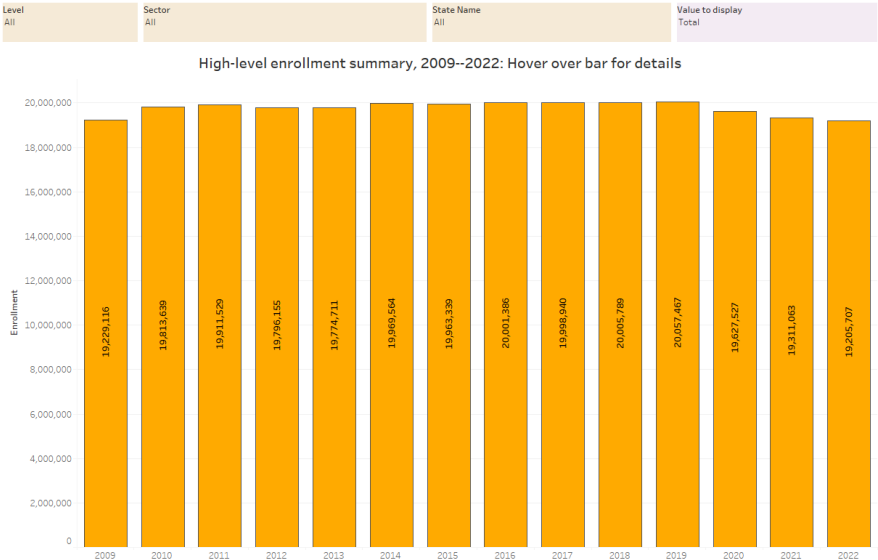
BACKGROUND

The function of enrollment management is critical to balancing Oregon State’s enrollment along several objectives that occasionally conflict with one another. This includes enrolling the right number of students into pathways that best align with their interests and support their success, with the appropriate capacity to generate tuition revenue necessary to balance the budget annually, as well as collaborating on research, processes and services that keep students enrolled to graduation, and ensuring the right number and mix of students is as much art as science. Enrollment management traditionally works at the nexus of historical trends, current realities, and aspirational goals looking forward. With the university’s new strategic plan in place, it is a good time to look back at recent accomplishments while looking forward to the future OSU that enrollment management efforts will help to create.

NATIONAL ENROLLMENT CONTEXT

Total college enrollment in the US in 2022 (the most recent data available in federal databases) has fallen to about 2009 levels (see Figure 1). But given the complexity of the higher education system in the US, and the diversity of institutional types, a single rollup of the national data is neither instructive nor insightful. Different sectors and different parts of the country are affected differently. (Note: All charts in this document will be provided in larger format in the appendix for detailed viewing).

Figure 1: National Enrollment Trends



For instance, breaking enrollment into smaller pieces over this time frame, we see divergent trends:

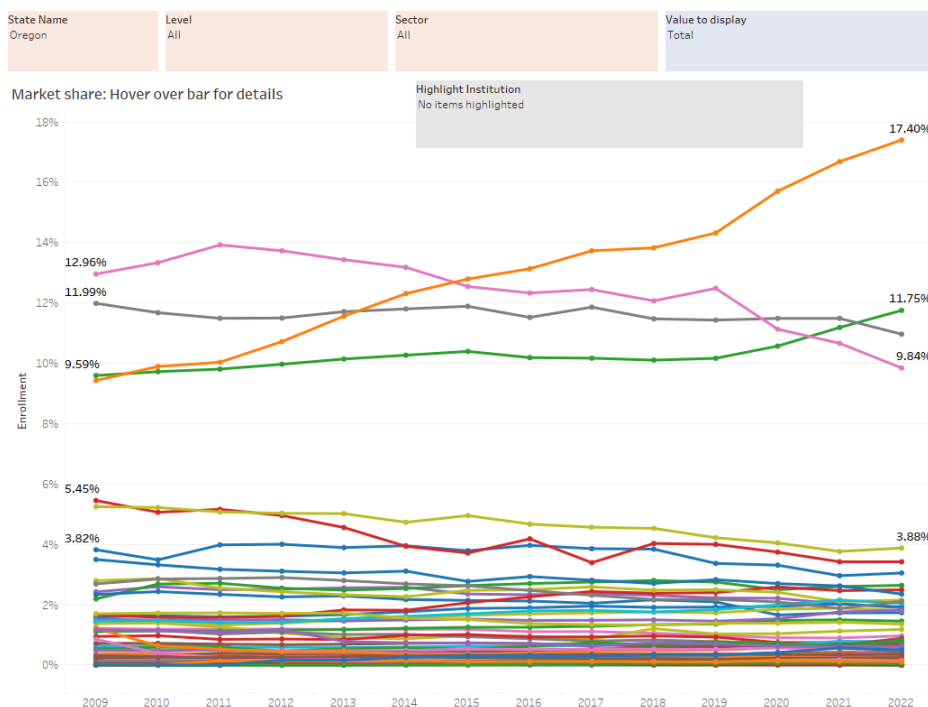
- Undergraduate enrollment is down from 16.5M to 15.9M, while graduate enrollment is up from 2.7M to 3.2M.
- Public two-year enrollment has been affecting all of higher education, falling from 5.8M to 4.5M students, while public four-year enrollment has increased from 8.7M to 9.1M.
- Public land grant universities have seen similar increases, from 1.5M to 1.8M, while public flagships have increased from 1.4M to 1.6M. Both groups have recovered from COVID losses but are still behind peak years in 2020 and 2021.
- Enrollment in the [universities in the Power Five athletic conferences](#) (Big Ten, Southeastern Conference, Atlantic Coast Conference, Pac-12, Big 12) have seen steady increases, from 1.9M to 2.4M in total enrollment.
- Smaller four-year regional publics have been affected more by market shifts and have seen enrollment decrease from almost 4M to 3.6M.

In national context, the state of Oregon is a relatively small player, enrolling just over 1% of all college students in the US; by comparison, California enrolls over 13%, Texas 8%, and New York and Florida about 6% each.

But within Oregon, OSU is the dominant provider of higher education, and its growth has been remarkable. Oregon State University (in orange in Figure 2) enrolls 17.4% of all college students in Oregon, across all institutional types. In 2009, OSU was fourth largest among two year and four-year institutions, at 9.4% of total enrollment.

On this chart of market share, UO is green, Portland State is gray, and PCC is magenta.

Figure 2: Market Share in Oregon



In the universe of four-year public universities in the state, OSU (excluding OSU-Cascades) enrolls 34.4% of all students, while UO enrolls 23.2% and Portland State enrolls 21.7%. SOU, OIT, WOU, EOU, and OSU-Cascades all enroll less than 6% of the total in this group. (See Figure 3 in charts appendix.)

ENROLLMENT TRENDS AT OSU

Overall Enrollment

As mentioned, enrollment at all universities is complex, and at OSU, the combination of campuses and delivery level, student levels (graduate, undergraduate, and professional), student residency, and student status (full-time vs. part-time) makes a simple overview of enrollment difficult, if not impossible. Each component of student enrollment contributes in various ways to OSU’s mission and budget.

Taking a portfolio approach to understanding and managing the changing mix is critical to OSU’s financial health and vitality, and to mitigating the risk of enrollment swings based on demographic or economic factors. The data presented here are not intended to be a comprehensive analysis of enrollment patterns, but rather to highlight key trends and to provide important takeaways to frame opportunities and challenges.

Key Trends

OSU's growth since 2005 is dramatic when measured against larger national trends, and even against growth in populations in the Pacific Northwest. In the years between the fall terms of 2005 and 2023, overall student enrollment at OSU increased by a remarkable 87%, while credit hour growth was 67%. In fact, OSU has marked 27 consecutive years of fall-over-fall enrollment headcount growth going back to Fall 1996, a trend that continued even during the COVID pandemic. (See Figure 4 in charts appendix.)

No other public, R1 land grant or flagship university can match that streak of consecutive year-over-year growth. Moreover, since the streak began (1996) only one institution has grown at a faster rate (UC Riverside), and only one has grown faster since 2005 (Utah State).

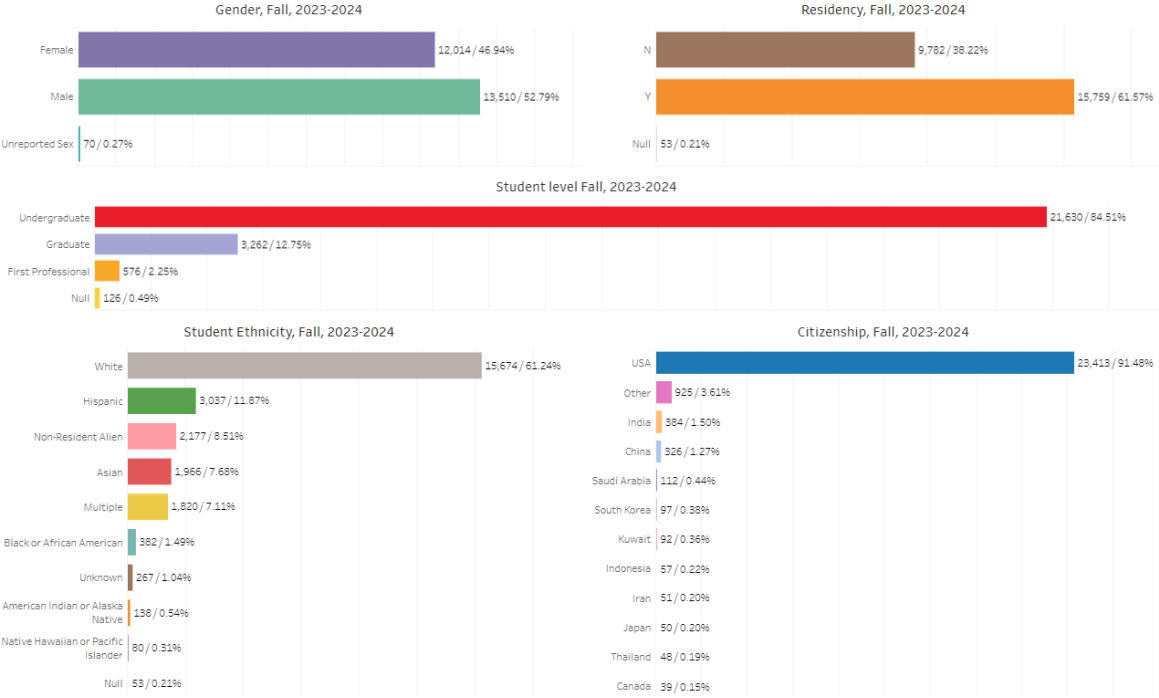
As a result of this growth, OSU now enrolls more students, more undergraduate students, more graduate students, more Oregon residents, more nonresidents, more international students, and more students on a single campus (Corvallis) than any other four-year public university in the state.

During recent growth spurts driven by part-time, Ecampus enrollment, credit hours have increased less dramatically than overall headcount, but that trend is reversing; in the past three terms, credit hours have increased faster than headcount, mostly the result of a return of more full-time students at Corvallis, and some gains in full-time students in Ecampus.

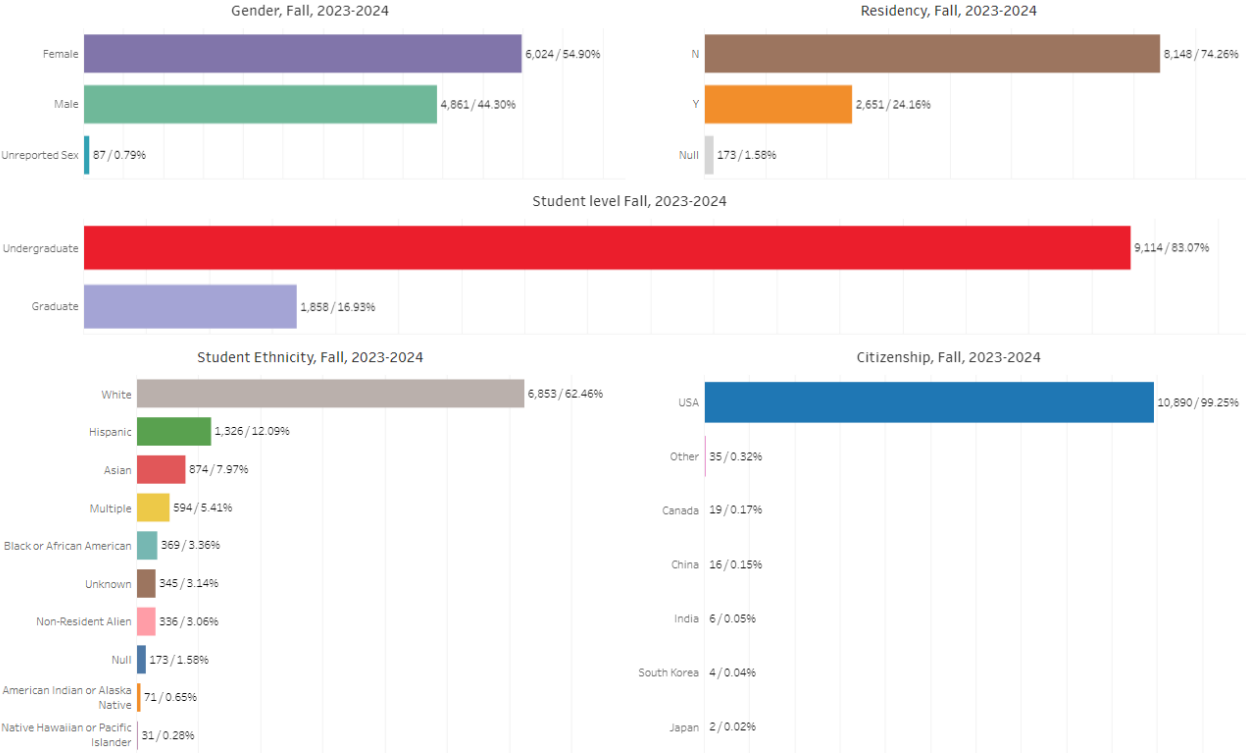
The complexity and fluidity of the enrollment mix makes attempting to answer simple questions like, "What is our enrollment?" difficult, if not impossible, without providing context. The chart below and the two charts that follow are intended to provide an overview and some context to the discussion. The first chart is presented full-size and not duplicated in the Appendix. The second and third charts are Figures 5 and 6.

		Fall									
		2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	
Corvallis	Undergraduate	20,505	20,708	20,784	20,366	20,281	19,448	19,618	19,940	20,481	
	First Professional	579	561	600	621	620	620	609	594	576	
	Graduate	3,406	3,403	3,376	3,305	3,302	3,198	3,140	3,064	3,131	
		24,490	24,672	24,760	24,292	24,203	23,266	23,367	23,598	24,188	
Ecampus	Undergraduate	3,808	4,274	4,706	4,926	5,541	6,697	7,439	8,503	9,114	
	First Professional							1			
	Graduate	974	1,057	1,076	1,275	1,477	1,760	1,812	1,688	1,858	
	Unclassified							2			
		4,782	5,331	5,782	6,201	7,018	8,457	9,254	10,191	10,972	
Cascades	Undergraduate	931	987	1,015	1,037	1,074	1,115	1,129	1,134	1,149	
	Graduate	160	215	248	282	287	325	159	145	131	
	First Professional							45	87	126	
		1,091	1,202	1,263	1,319	1,361	1,440	1,333	1,366	1,406	
Other	Undergraduate	88	98	99	123	122	113	93	46	38	
	Graduate				77	70	83	61	38	32	
		88	98	99	200	192	196	154	84	70	
Grand Total		30,451	31,303	31,904	32,012	32,774	33,359	34,108	35,239	36,636	
Totals by Level											
Undergraduate		25,332	26,067	26,604	26,452	27,018	27,373	28,279	29,623	30,782	
First Professional		579	561	600	621	620	620	655	681	702	
Graduate		4,540	4,675	4,700	4,939	5,136	5,366	5,172	4,935	5,152	
Percent of Totals by Campus											
Corvallis		80.4%	78.8%	77.6%	75.9%	73.8%	69.7%	68.5%	67.0%	66.0%	
Ecampus		15.7%	17.0%	18.1%	19.4%	21.4%	25.4%	27.1%	28.9%	29.9%	
Cascades		3.6%	3.8%	4.0%	4.1%	4.2%	4.3%	3.9%	3.9%	3.8%	
Other		0.3%	0.3%	0.3%	0.6%	0.6%	0.6%	0.5%	0.2%	0.2%	
Percent of Totals by Level											
Undergraduate		83.2%	83.3%	83.4%	82.6%	82.4%	82.1%	82.9%	84.1%	84.0%	
First Professional		1.9%	1.8%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	
Graduate		14.9%	14.9%	14.7%	15.4%	15.7%	16.1%	15.2%	14.0%	14.1%	

Corvallis / Cascades breakouts (Figure 5):



Ecampus breakouts (Figure 6):



SUMMARY OF RECENT ACCOMPLISHMENTS AND PROJECTS IN PROGRESS

The last several years have been successful from an enrollment standpoint, resulting in several impressive outcomes:

- Three consecutive years of record first-year applications and enrollment.
- Greater geographic and ethnic diversity.
- Increasing academic quality of incoming students, with median high school GPA rising by one-tenth of a point over the past four years.
- Higher levels of net tuition revenue as a result of increased nonresident enrollment.
- Lower net costs for low-income Oregonians via reallocation of institutional financial aid (see Figure 8).
- Improving graduation and retention rates (see Figure 9).
- Continuing dramatic growth in Ecampus enrollment at both the graduate and undergraduate levels.
- Development and implementation of data models and analytics to provide better reporting, modeling, and projections of new student enrollments.
- Full implementation of an undergraduate admissions customer relations management system (Slate by Technolutions).
- Refocusing efforts to stem the loss of students from China by growing enrollment of students from India.

There is still much to accomplish as OSU's new strategic plan, *Prosperity Widely Shared*, is implemented:

- Increase access for transfer students by offering faster and better assessments of credit transfer information, including services for students in the pre-application stage.
- Fully operationalize the "One OSU" approach to offering a path to an OSU degree to every qualified Oregonian.
- Building on progress and reinforcing OSU's commitment to diversity, equity, and inclusion in light of recent US Supreme Court rulings.
- Develop a centralized Slate Practice to expand the implementation of the software university-wide, to include Ecampus and the Graduate School. We are also discussing using Slate for pre-college engagement in OSU's Precollege Programs and various Extension activities, which will give us a better understanding of those programs and their effect on enrollment.

- Manage continuing undergraduate admissions applications growth by using greater discernment at the admissions phase, to direct students into the proper pathway that ensures the greatest chance of attaining an OSU degree in a timely fashion.
- Hedge shifts in population and demographics by expanding OSU's footprint to broader geographic regions.
- Work in partnership with the OSU Foundation to secure funding for the "Finish in Four" scholarship program, intended to reduce debt levels for the lowest-income Oregonians and provide additional academic opportunities.

EXTERNALITIES AND OTHER CHALLENGES

Short term:

- The Department of Education has had great difficulties this year in the rollout of the revised Free Application for Federal Student Aid (FAFSA). Student completion rates are down by as much as 50%, and the issues affect students across all regions and all school types. We have responded by changing the confirmation deadline for Corvallis and OSU-Cascades first-year students, who are most affected by this. OSU is monitoring this situation daily, as much depends on the department sending data out by mid-March as had been promised.
- Similarly, the changes to the form and the resulting eligibility index mean more students will qualify for the federal Pell Grant (grants awarded to students who have exceptional financial need), and that more students will qualify for the highest level of award of \$7,400. However, the changes are putting pressure on state funding for the Oregon Opportunity Grant (OOG), and early estimates (which are not precise) have OSU students losing as much as \$7 million in total. If estimates and revisions are not resolved, OSU may have to make a choice between losing enrollment or increasing institutional financial aid.
- The disintegration of the Pac-12 Athletic Conference may have some effect on the university's brand position, reputation, and appeal to students. There is no precedent for us to learn from, or to add to our models. Our survey analysis of applicants to OSU suggests that some small percentage consider athletics events and participation to be among their top considerations, but it is not clear whether the conference situation is well-known or would be considered a deal-breaker.
- As is the case at most colleges and universities, OSU is affected by very low unemployment rates and the resulting competition for talent. A number of positions related to the enrollment management function are unfilled, many for extended periods. Although OSU has benefitted from process and operational efficiencies recognized through the adoption of new software tools, the recent growth in applications for undergraduates (first-year applications to Corvallis and OSU-Cascades have increased 103% since 2017, for instance), coupled with the enrollment growth aspirations outlined in *Prosperity Widely Shared* will require adding processing staff in admissions, financial aid, and scholarships and ways to create additional operational efficiencies.

- There are increasing demands at the state and federal government levels about improving ease of transfer. As is often the case, the challenge seems relatively straightforward and easy to solve in concept, but quite challenging in practice. The state of Oregon has mandated a common course numbering system for the public institutions that should make much of the process easier, but there are still major challenges to overcome in making the process as smooth as it should be for students.
- OSU is extending the implementation of the recruitment customer relationship management system (Slate by Technolutions) to both the graduate school and Ecampus. It is anticipated that coordinating systems configuration and normalizing processes across all domains, and managing the feed of data to and from Banner, will require considerable work and attention to even minute differences in the way those systems work.

Longer term:

- The state of Oregon lags well behind most states in funding four-year public institutions, and in funding state financial aid programs. While it is true that recent years have shown fairly substantial increases in investment by the state, past trends in funding left Oregon far behind other states (including all the states bordering Oregon) and it will take considerable continuing investment gains to bring Oregon even to the middle of the pack (see figures 9 and 10).
- Demographics will be challenging, at least for the visible horizon. While concerns about the numbers in the so-called “demographic cliff” have been somewhat exaggerated, it is true that by the year 2034, the US will return to high school graduate numbers on par with 2009. Oregon is slightly less affected by this shift, but the declines in this state will still be noticeable. The greater shift is the changing mix of student characteristics that suggest high school graduates in the future will be more likely to be from households with lower incomes, lower levels of parental attainment of post-secondary certificates or degrees, and increasingly minoritized or marginalized backgrounds, all of which have historically translated into lower college attendance rates.
- It will be important to understand the benefits and tradeoffs inherent in optimizing enrollment of resident, nonresident, and international students. Many of the goals of *Prosperity Widely Shared* will be supported by increasing tuition revenue from enrollment growth embedded in the plan. OSU must address the proper balance of its mission to the people of the state of Oregon and its need to generate revenue to ensure the education it offers to Oregonians is of the highest quality possible.
- Academic programs are the heart of enrollment, and it will be important to understand how curricular offerings on all campuses, modalities, and levels are serving students and the state of Oregon well. It is clear that our previous growth has been driven by OSU’s ability to bring up new offerings quickly without sacrificing quality, but it is likely that competition from other institutions will increase the pressure to continue or ramp up that pace going forward.

SUMMARY

These are exciting times at Oregon State. With an impressive track record of unprecedented enrollment growth compared to similar institutions, strong and visionary leadership at the university level and in the colleges, and a clear vision and commitment to the university's new strategic plan, prospects are excellent for delivering on the promise that OSU brings to its students and the state of Oregon.

APPENDIX

ENROLLMENT MANAGEMENT AT OSU

Strategic enrollment management strategies at OSU are led by the Division of Enrollment Management (DEM) with some responsibilities shared and distributed among units across the university. While DEM manages and coordinates many of the processes that help identify, recruit, admit, enroll, and retain undergraduate students, success requires a collaborative effort of multiple units.

Units within DEM are:

- *Office of Undergraduate Admissions* identifies, recruits, and admits qualified undergraduate applicants to OSU in alignment with enrollment goals and in collaboration with university partners.
- *Office of Financial Aid* administers funds from Federal, state, institutional, and private sources to ensure higher educational opportunities are available to all eligible students.
- *Office of Scholarships* administers institutional scholarships, provides scholarship information to students and families, and supports academic colleges and other campus partners in management and awarding of their scholarship funds.
- *Office of Precollege Programs* supports and oversees programs designed to provide youth from diverse backgrounds pathways to an OSU education.
- *Degree Partnership Program* allows students to be jointly admitted and enrolled at OSU and any of our community college partner schools.
- *Enrollment Management Information Technology* collaborates with the University Information and Technology (UIT), and provides the information systems including responsibility for our campus-wide implementation of the Slate recruitment and admissions customer relations management system; third party data integration; digital marketing; web design, maintenance and support; business and data analysis; routine reporting; and hardware management to support enrollment management.
- *The Office of International Admissions* serves as the liaison between university partner INTO and the Division of Enrollment Management, and reports directly to the Vice Provost of Enrollment Management.

Additionally, EM works closely with the following units:

- *INTO OSU*: Directly recruits, admits and supports the enrollment of international students through pathway and direct entry programs.

- *Division of Undergraduate Education*: Supports the development of new undergraduate academic programs by colleges, schools, and departments and aids in creation and delivery of experiential learning experiences (including Study Abroad) and is a valuable partner on issues of retention and graduation rates.
- *Division of Student Affairs*: Supports students' academic progress and success through the Office of Academic Achievement, University Housing and Dining, Health and Wellness support, START (new student orientation) and multiple co-curricular programs.
- *Division of University Information Technology*: Provides enrollment management technology and data solutions to meet the complex needs of internal and external users. In addition, IAR (Institutional Research and Analytics) functions support and inform many day-to-day and long-term benchmarking activities.
- *Division of Outreach and Engagement*: Provides education and programming for Oregon youth related to preparing for and attending college, including, but not limited to OSU. Programs include 4-H, Outdoor School, and Juntos.
- *Academic colleges*: Works in partnership with EM to create the academic programs, and to support outreach, engagement, communications, and programs that attract students to OSU.
- *Ecampus*: While program creation, recruitment, and administrative functions of Ecampus are mostly self-contained, EM provides critical processing and process management support.
- *The Graduate School*: Graduate programs, whether in the colleges or the graduate school work on an ad-hoc basis with Enrollment Management to share best practices and strategies to increase or optimize enrollment.

EM also convenes formal and ad-hoc groups to coordinate efforts between and among university units.

CHARTS APPENDIX

Figure 1: National Enrollment Trends

Level All	Sector All	State Name All	Value to display Total
--------------	---------------	-------------------	---------------------------

High-level enrollment summary, 2009--2022: Hover over bar for details

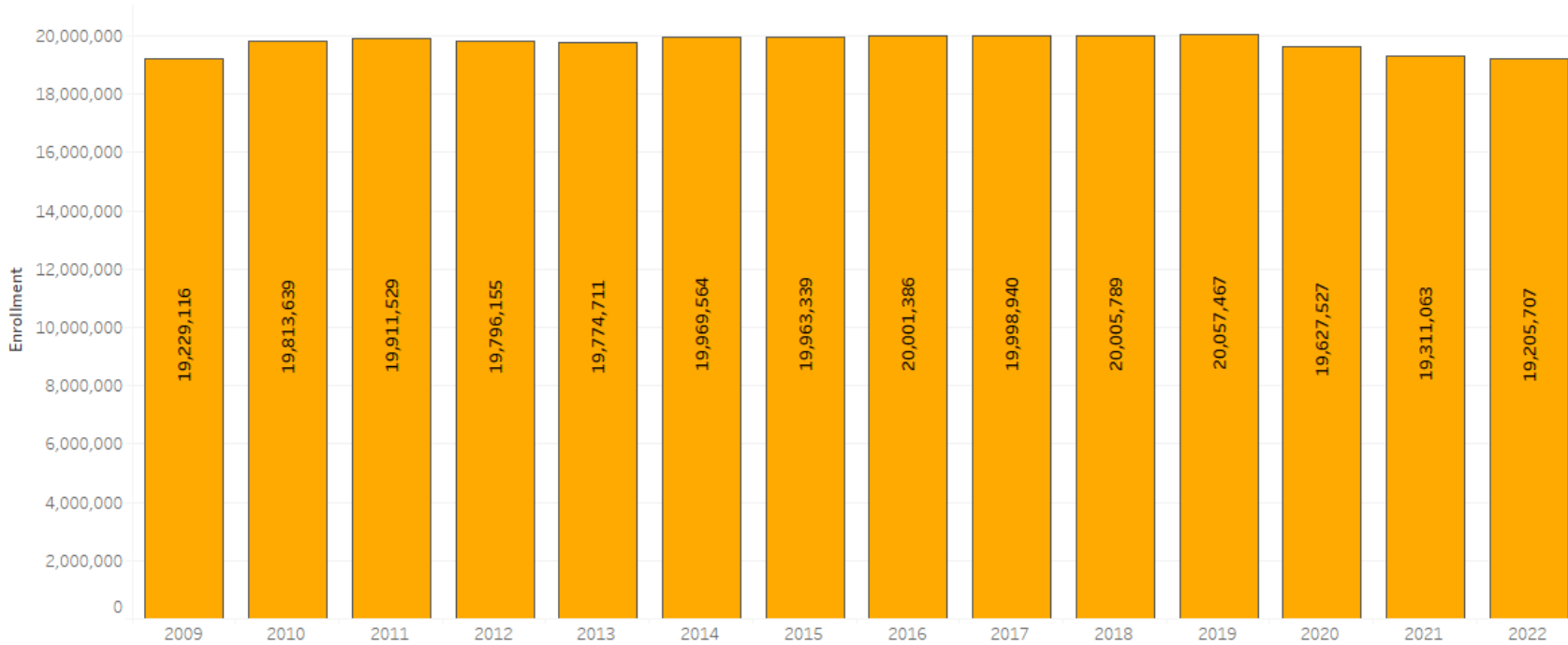


Figure 2: Market Share of All Colleges and Universities in Oregon

State Name Oregon	Level All	Sector All	Value to display Total
----------------------	--------------	---------------	---------------------------

Market share: Hover over bar for details

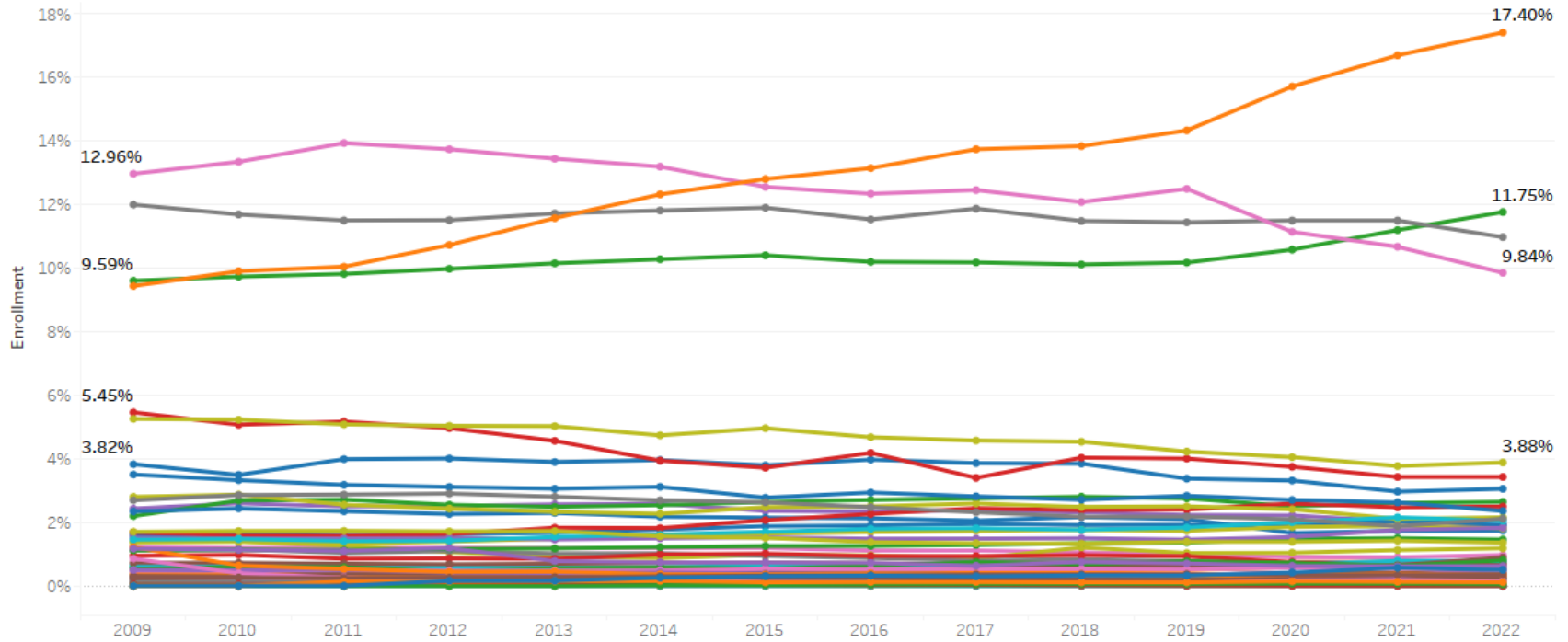
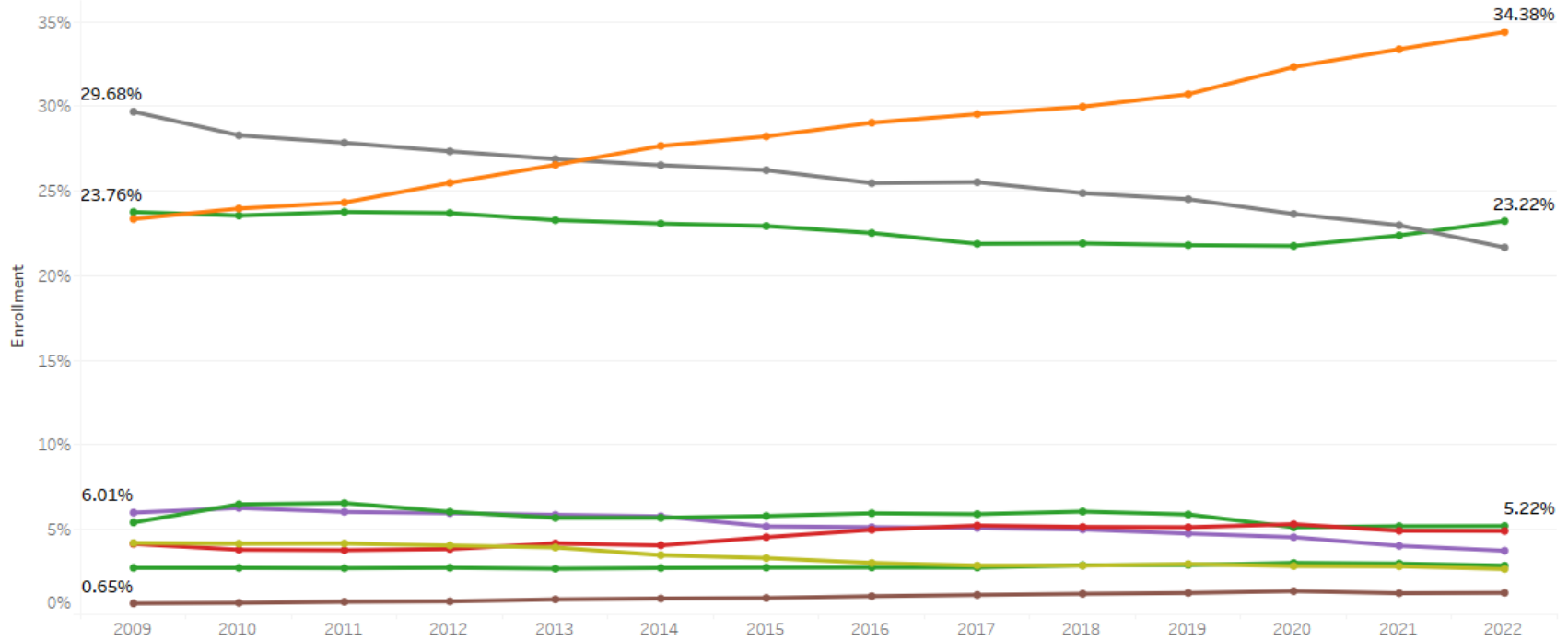


Figure 3: Market share among four-year public institutions in Oregon

State Name Oregon	Level All	Sector Public, 4-year or above	Value to display Total
----------------------	--------------	-----------------------------------	---------------------------

Market share: Hover over bar for details



April 4-5, 2024 Board of Trustees Meetings

Figure 4: OSU Headcount and Credit Hours, 2005—2023, Fall Term

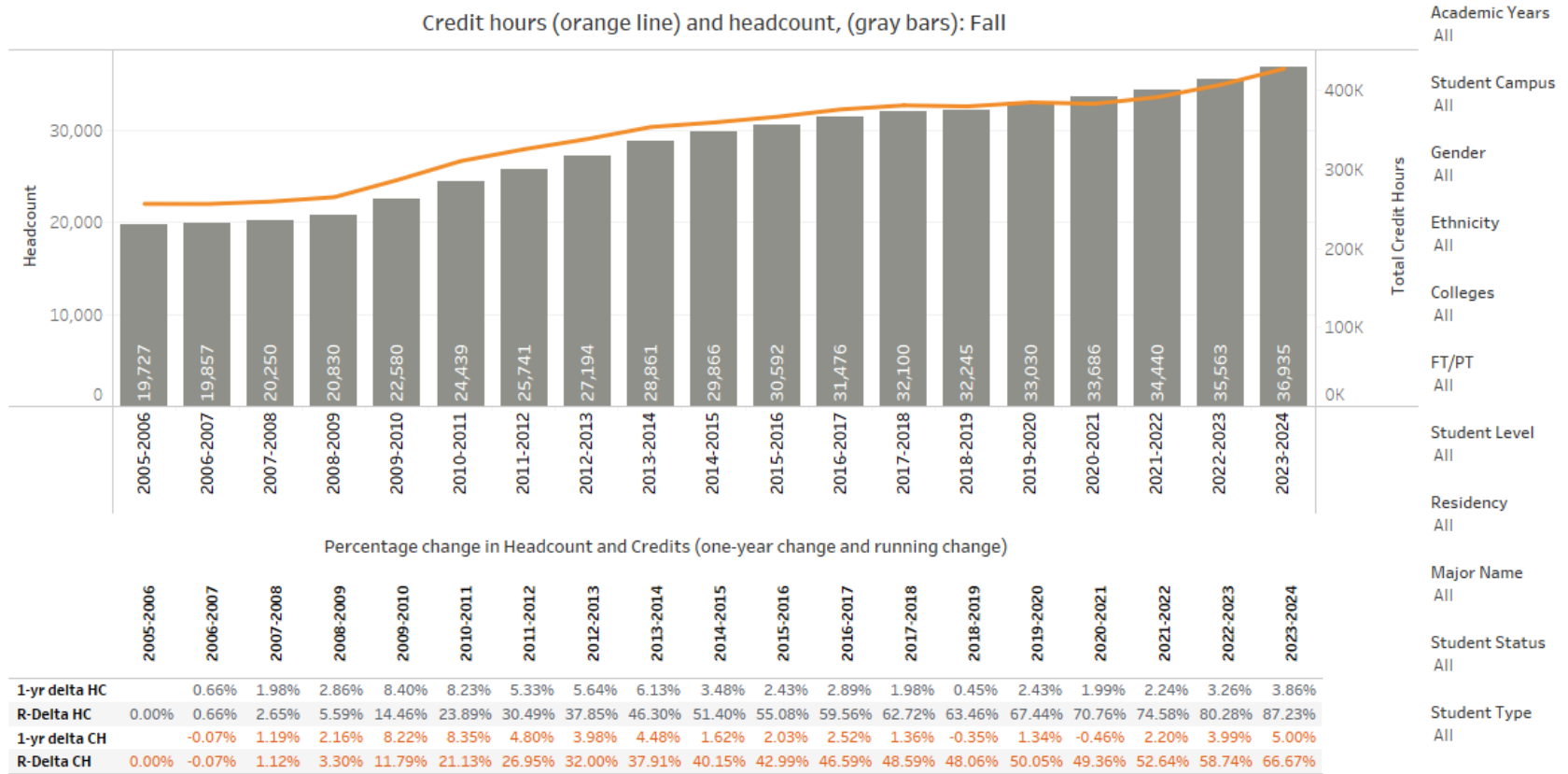


Figure 5: Profile of Corvallis and Cascades Enrollment, Fall 2023

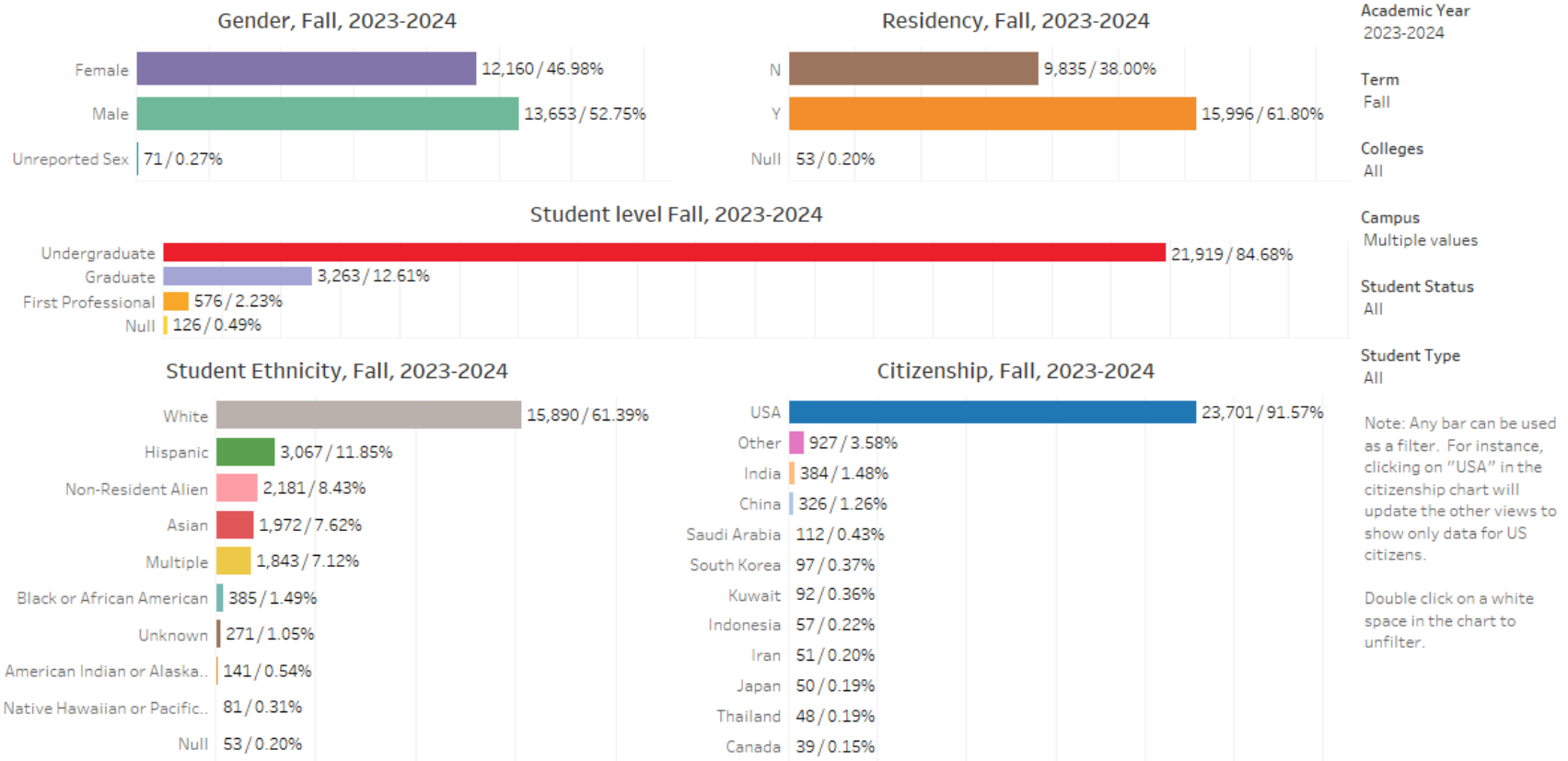


Figure 6: Profile of Ecampus Enrollment, Fall 2023

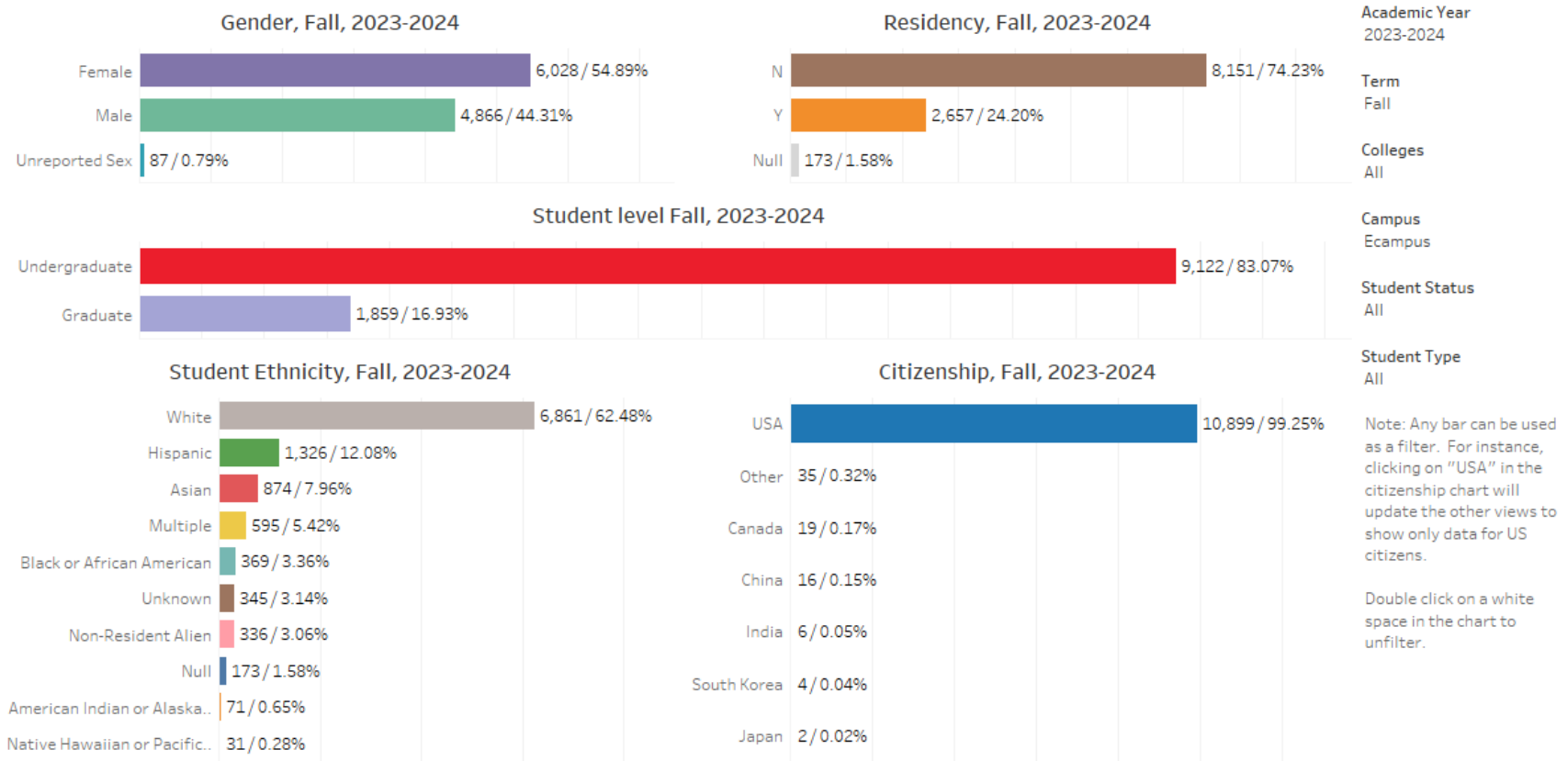


Figure 7: Net Cost to Oregon Resident by Family Income

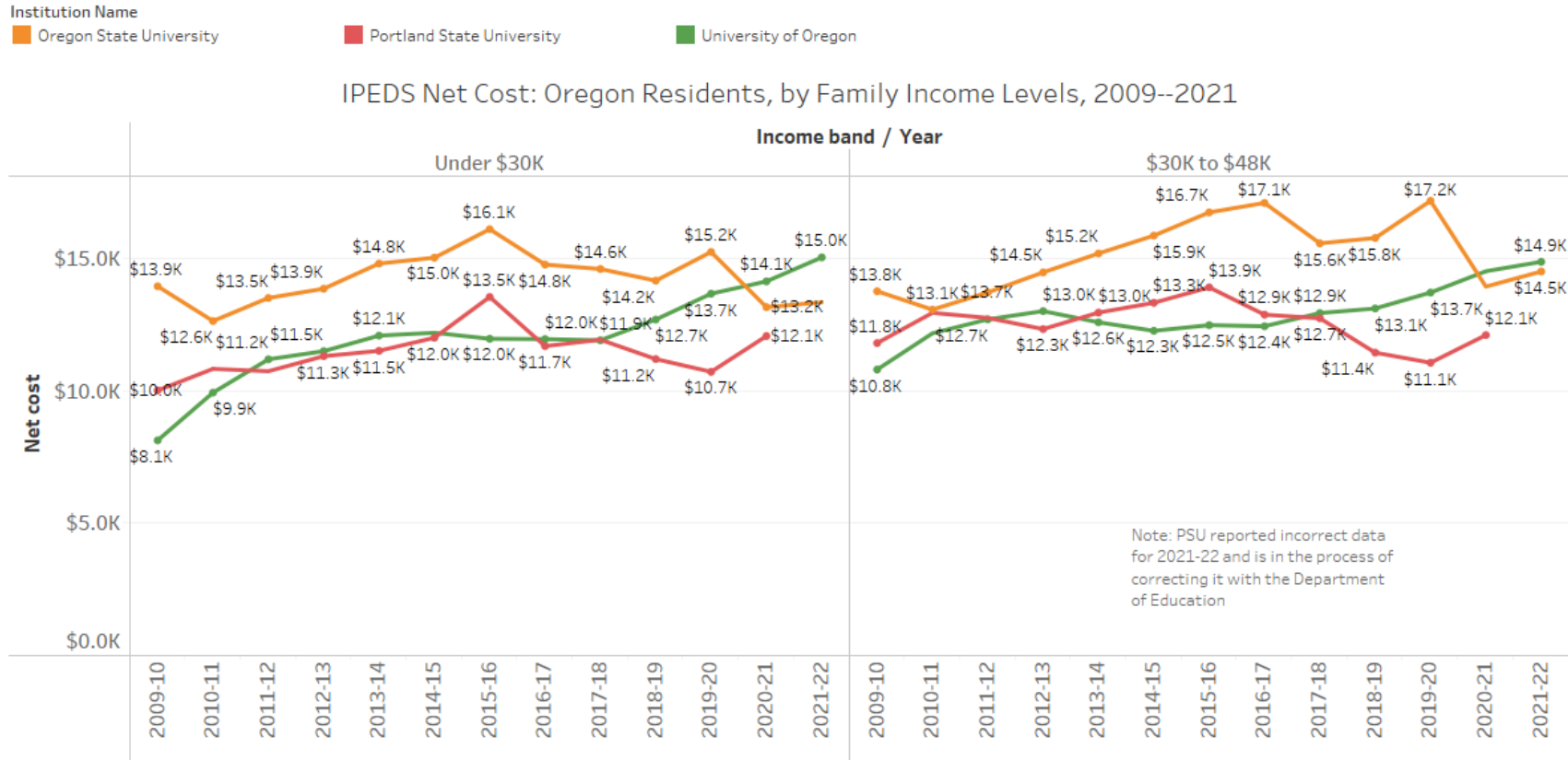
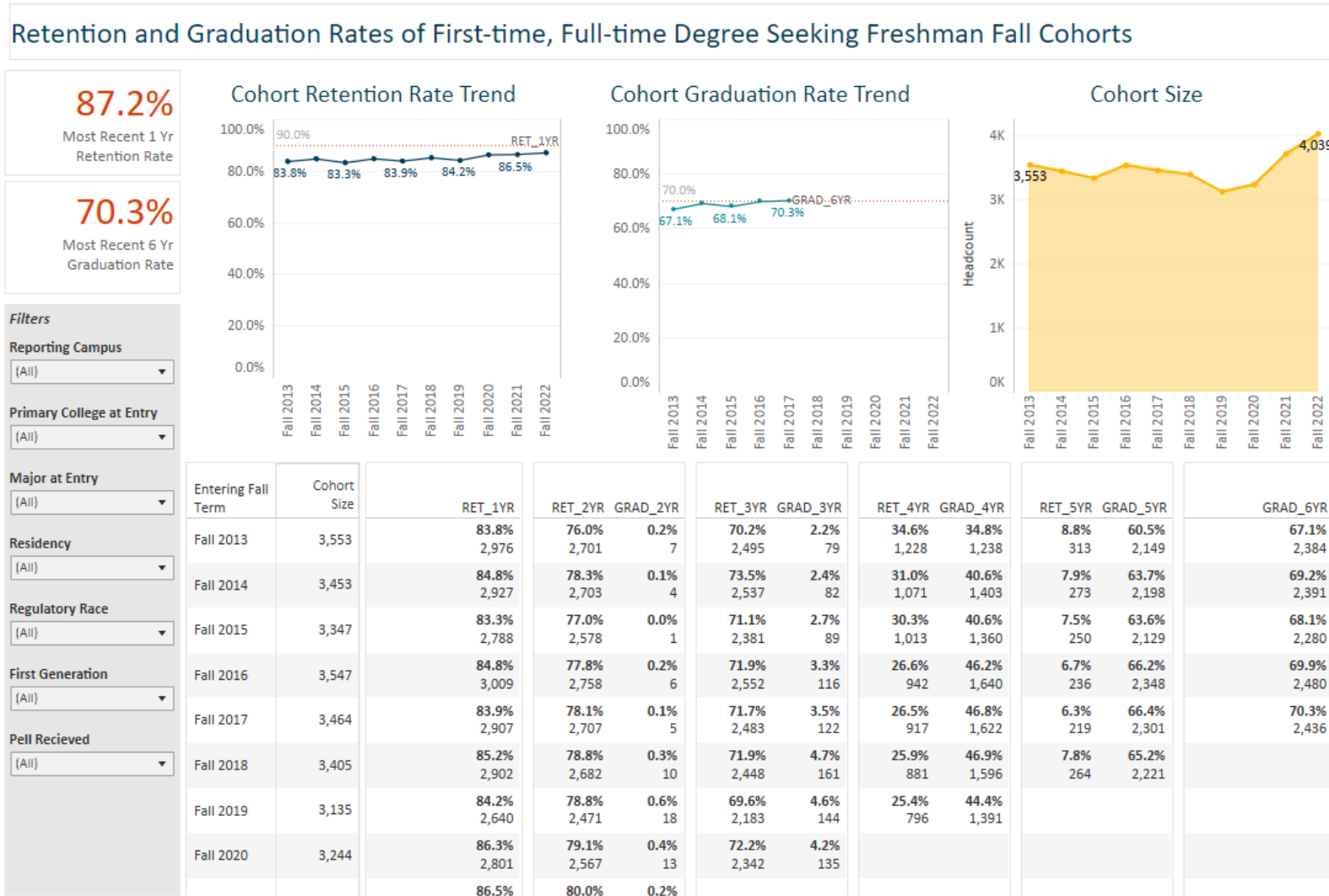


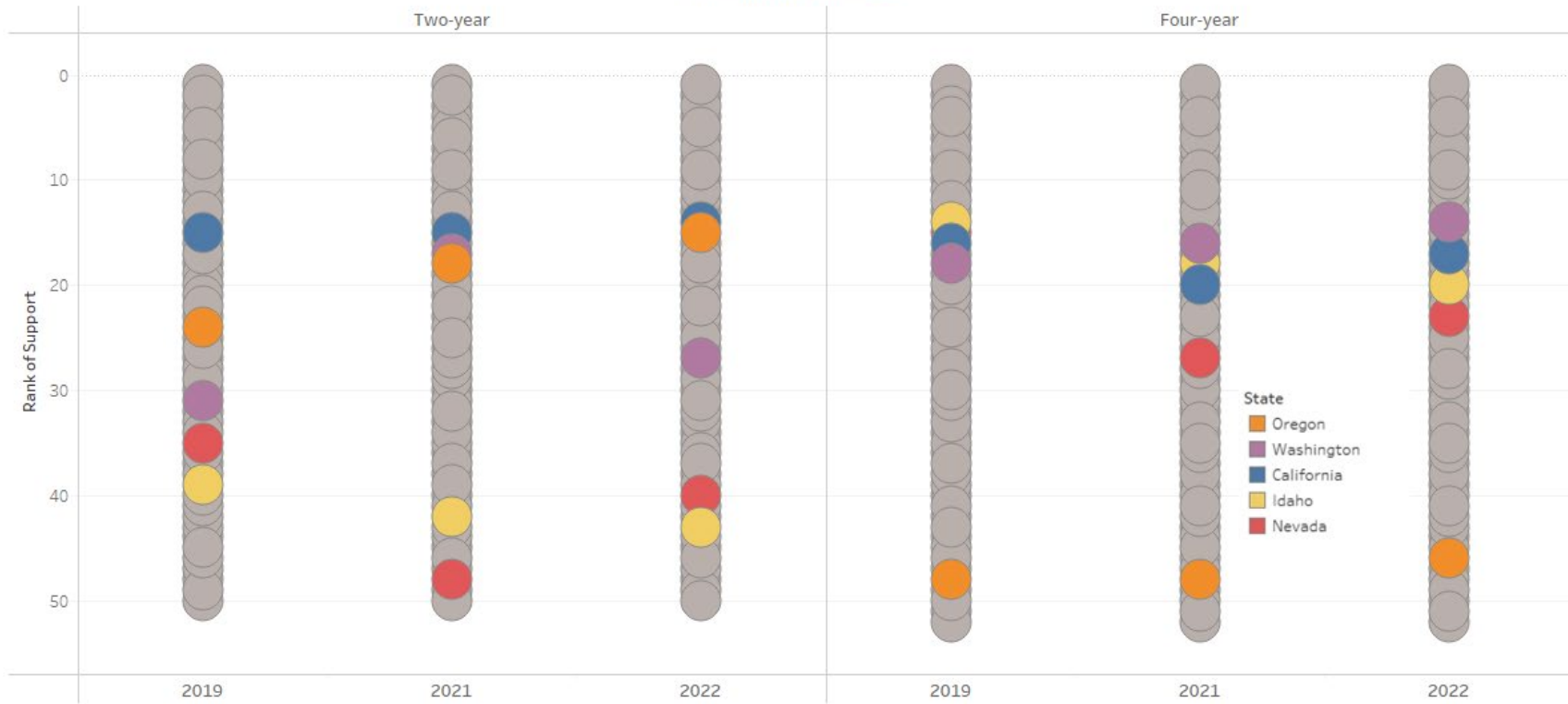
Figure 8: Undergraduate Graduation Rates



SHEF/SHEEO: Rank of state support per FTE, 2019, 2021, and 2022

Rank of State Support Per FTE at two-year (left) and four-year Institutions: Oregon and neighboring states

Source: <https://shef.sheeo.org/>



SHEF/SHEEO: Rank of financial aid per FTE, 2019, 2021, and 2022

Rank of Financial Aid Per FTE at two-year (left) and four-year Institutions: Oregon and neighboring states

Source: <https://shef.sheeo.org/>

